

FORM PTO-1340
(REV. 11-2000)

U.S. DEPARTMENT OF COMMERCE PATENT AND TRADEMARK OFFICE

ATTORNEY'S DOCKET NUMBER

TRANSMITTAL LETTER TO THE UNITED STATES
DESIGNATED/ELECTED OFFICE (DO/EO/US)
CONCERNING A FILING UNDER 35 U.S.C. 371

23319.02

U.S. APPLICATION NO. (if known, see 37 CFR 1.5)

10/070893

INTERNATIONAL APPLICATION NO.
PCT/US00/24780INTERNATIONAL FILING DATE
8 September 2000PRIORITY DATE CLAIMED
8 September 1999

TITLE OF INVENTION METHOD AND APPARATUS FOR INTERACTIVELY PREPARING MARKETING PLANS

APPLICANT(S) FOR DO/EO/US Suzanne M. Bosze

Applicant herewith submits to the United States Designated/Elected Office (DO/EO/US) the following items and other information:

1. ☒ This is a **FIRST** submission of items concerning a filing under 35 U.S.C. 371.
2. ☐ This is a **SECOND** or **SUBSEQUENT** submission of items concerning a filing under 35 U.S.C. 371.
3. ☒ This is an express request to begin national examination procedures (35 U.S.C. 371(f)). The submission must include items (5), (6), (9) and (21) indicated below.
4. ☐ The US has been elected by the expiration of 19 months from the priority date (Article 31).
5. ☒ A copy of the International Application as filed (35 U.S.C. 371(c)(2))
 - a. ☒ is attached hereto (required only if not communicated by the International Bureau).
 - b. ☐ has been communicated by the International Bureau.
 - c. ☐ is not required, as the application was filed in the United States Receiving Office (RO/US).
6. ☐ An English language translation of the International Application as filed (35 U.S.C. 371(c)(2)).
 - a. ☐ is attached hereto.
 - b. ☐ has been previously submitted under 35 U.S.C. 154(d)(4).
7. ☐ Amendments to the claims of the International Application under PCT Article 19 (35 U.S.C. 371(c)(3))
 - a. ☐ are attached hereto (required only if not communicated by the International Bureau).
 - b. ☐ have been communicated by the International Bureau.
 - c. ☐ have not been made; however, the time limit for making such amendments has NOT expired.
 - d. ☐ have not been made and will not be made.
8. ☐ An English language translation of the amendments to the claims under PCT Article 19 (35 U.S.C. 371 (c)(3)).
9. ☒ An oath or declaration of the inventor(s) (35 U.S.C. 371(c)(4)).
10. ☐ An English language translation of the annexes of the International Preliminary Examination Report under PCT Article 36 (35 U.S.C. 371(c)(5)).

Items 11 to 20 below concern document(s) or information included:

11. ☐ An Information Disclosure Statement under 37 CFR 1.97 and 1.98.
12. ☐ An assignment document for recording. A separate cover sheet in compliance with 37 CFR 3.28 and 3.31 is included.
13. ☐ A FIRST preliminary amendment.
14. ☐ A SECOND or SUBSEQUENT preliminary amendment.
15. ☐ A substitute specification.
16. ☐ A change of power of attorney and/or address letter.
17. ☐ A computer-readable form of the sequence listing in accordance with PCT Rule 13ter.2 and 35 U.S.C. 1.821 - 1.825.
18. ☐ A second copy of the published international application under 35 U.S.C. 154(d)(4).
19. ☐ A second copy of the English language translation of the international application under 35 U.S.C. 154(d)(4).
20. ☒ Other items or information:
International Preliminary Examination Report; International Search Report; Postcard Receipt

PCT/US00/24780

ATTORNEY'S DOCKET NUMBER
23319.02

CALCULATIONS PTO USE ONLY

METHOD AND APPARATUS FOR INTERACTIVELY PREPARING MARKETING PLANS

5 An interactive marketing planning system and method are disclosed for assisting marketing professionals in developing strategies for each element of the marketing mix and then combining them into a business plan. The marketing planning system is set up in advance to lead the planner through the planning process following a logical path, while remaining an open system in which experts may incorporate their own ideas.

10 The program contains a list of information needed for business analysis and explains how to define the key variables for a particular business. After the numbers are entered in the main chart, the plan can access the subcharts by hitting ^S. In the subcharts and the graphs, the system rearranges the data in several creative ways so as to reveal their true meaning in a marketing context. The planner has a certain task to perform in each chart. The charts ensure all of the relevant data for performing the prescribed task - be it analysis or decision making - are incorporated in the chart and shown to the planner. With the aid of the function keys, the marketing planning system gives marketing advice,
15 helps identify strategy options and draw conclusions from each chart. The summary of the conclusions will be the basis for the business plan.

BACKGROUND OF THE INVENTION

20 This invention relates to an interactive on-line marketing planning system that assists the marketing professionals in developing strategies for each element of the marketing mix. Marketing planning is based on a complex strategic process. The idea is that by organizing and providing a logical structure for that complexity, marketing planning becomes easy and simple to use and communicate, even to non-planners. Much of the thinking and organizing has been done before the planner sits down with a personal computer. Once freed from having to think about the logic of the market planning process, the user is better able to discover the real business opportunities.

SUMMARY OF THE INVENTION

25 In accordance with the teachings of this invention, there is disclosed a method of devising on a computer a marketing plan for a particular product/service provided by a given entity. The method comprises the steps of defining one or more variables that are used to carry out the method, creating a series of charts for implementing a process of analyzing the defined variables and defining a product
30 name, a time frame over which a process of analysis is carried out, and a geographic unit in which the product is marketed. The process of analysis includes the steps of analyzing the size of the market for the particular product within a given geographic unit and calculating the entire market for the particular product with the given geographic unit, determining the share of the entire market of the particular product marketed by the entity, setting goals as to the profit level of the particular product
35 of the entity, and monitoring the current profit level of the particular product with the profit level goals.

whether the current profit level is below the profit level goals, and if below, discontinuing the marketing of the particular product.

5 In a still further aspect of this invention, this method of devising a market plan further includes the step of developing a marketing strategy for the particular product, wherein the marketing strategy is a function of the following strategies: the development of the particular product, setting its price, determining its distribution, planning its advertising and determining its promotion strategy. When the current profit level of the particular product is compared with the profit level goals and, if less, adjusting one or more of the strategies.

10 DESCRIPTION OF THE PREFERRED EMBODIMENT OF THIS INVENTION

The marketing planning system carries out the following operations. It organizes the planner's every day work process by providing space within the computer program for all information, assumptions and conclusions - everything the planner needs. It stores all the information in its marketing context and can be accessed and manipulated by a single keystroke. In addition to being
15 a data base and a spread sheet, the program also incorporates a word processing function for recording observations and conclusions.

The system process that organizes and provides a logical structure for the complexity of marketing planning and making it easy and simple to use and communicate, even to non-planners, is original and proprietary. The system has laid out the process, in an interdependent system of charts,
20 which marketing planners should go through when preparing a marketing plan. It encompasses every major decision a planner has to make to develop a strategy. The completeness of charts makes sure that nothing gets overlooked.

The program structure provides a way for the program to lead the planner through the planning process from analysis to strategy (i.e. the menus and the sequence of the charts). Each data
25 can be entered only at one particular place within the information flow and it can be changed only at that particular place.

One of the most important problems in business is to know what information is needed in order to understand the business. The second, when the information is available, how to analyze data so as to understand their marketing relevance. The market planning system provides the answers to
30 both these questions in an original and proprietary way: (1) List of information needed: the planning system comprises a comprehensive list of data needed for understanding the business, and the data is stored in meaningful charts and graphs instead of in a simple straight data base - thus immediately revealing the marketing significance of the numbers. Each charts incorporates all the information necessary for accomplishing the prescribed task. (With the aid of the F3 key, the planner can access
35 the information needed for the particular chart.); and (2) How the data is analyzed: the program rearranges the data entered in the main chart in subcharts and graphs in different ways so as to reveal

new way of looking at numbers and understanding their meaning.

5 The tasks assigned to the function keys make sure that marketing advice is available to the planner at each chart. By hitting the F1 key, for example, the user will find in addition to a description of how to fill in the chart, a description of the marketing purpose of the chart as well as a short description of the pertaining marketing concept. Under the F4 key, the system lists the assumptions and the operations that the user needs to make. The F5 key lists strategy options under various market conditions. Through analysis, the user understands the market conditions and by consulting the list, it will be easy to decide on the right strategy. The F6 key lists the conclusions the user has to draw from each chart. This will facilitate the analysis and make it easy to draw the right conclusions. The function keys work as a marketing consultant. (See description in Fig. 12)

15 The provision of a word processing function attached to each chart makes it possible that the planner can record his assumptions and conclusions chart by chart. It is very difficult to remember our thoughts, ideas and assumptions on which the market forecasts or marketing strategies were based. These functions (F4 and F6) make it easy for the planner to remember even after years. They also serve as a market monitoring system. The planner will constantly check to what extent the assumptions became reality. Should the assumptions turn out to be incorrect, the planner will need to revise the plan immediately. The planning system also provides a list of assumptions and conclusions needed per chart. By following the planning system step by step the non-planner will acquire the marketing process.

20 In summary, the marketing planning system is an integrated marketing data base with easy access and update capabilities. It is: (1) a quick and efficient competitive analysis model, (2) a marketing and strategic planning model, (3) a tool for making "what if" calculations in seconds, (4) a market monitoring instrument, (5) a marketing teaching instrument.

25 The method of marketing planning of this invention comprises the following steps: Step (1): The first step in business analysis is to identify the key variables influencing market development. The marketing planning system lists the types of data needed for business analysis and gives guidelines how to define the variables relevant to a particular industry. Step (2) The process comprises a series of charts following a logical sequence from analysis to strategy for each element of the marketing mix. The data will be entered in the charts although the program stores them in a database. Each number can be entered only at a special space, where its marketing meaning is the most relevant. Once the data is entered, the planner can access the subcharts and graphs which rearrange the numbers and thus reveal the underlying characteristic trends of the business. The program encompasses approximately 60 different charts, 60 subcharts, and 20 graphs. Step (3) The planner evaluates the market situation and draws strategic conclusions from each chart. The planning system facilitates market forecasts (by hitting F7), and allows the planner to evaluate the effects of alternate scenarios. It is true that we can make "what if" calculations with a regular spreadsheet. But

measure the consequences of an assumption on several spreadsheets at the same time. In addition, the planner will notice if an assumption is not consistent with previous ones or if it is out of line with the current market situation. Step (4) After having evaluated possible alternatives, we have to finalize our assumptions, and draw conclusions. The advantage of the planning system is that it reminds the planner of the assumptions at each step of the planning process. It also provides space for recording the assumptions and decisions.

The marketing planning system comprises eight sections and two strategic check points. Each section deals with one element of the marketing strategy development process. Each section is similar in structure. It starts with the analysis and leads the planner to drawing strategic conclusions.

THE MAIN MENU

0. SELECT PRODUCT

1. MARKET DEVELOPMENT ANALYSIS AND FORECAST (FIG. 2)

2. MARKET SHARE DEVELOPMENT ANALYSIS AND FORECAST (FIG. 3)

3. FINANCIAL ANALYSIS AND FORECAST (FIG. 4)

4. PRODUCT ANALYSIS AND STRATEGY DEVELOPMENT (FIG. 5)

5. PRICE ANALYSIS AND STRATEGY DEVELOPMENT (FIG. 6)

6. DISTRIBUTION ANALYSIS AND STRATEGY DEVELOPMENT (FIG. 7)

7. ADVERTISING ANALYSIS AND STRATEGY DEVELOPMENT (FIG. 8)

8. PROMOTIONAL ANALYSIS AND STRATEGY DEVELOPMENT (FIG. 9)

9. EXIT

PROGRAM SETUP:

The program is designed in a general way to suit most industries. During the installation process, the user can customize the program by defining the major criteria of the planning process. First the program asks for the name of the user, of the company and the department. Then the user selects the language in which the program is to be installed.

Then the product name is entered for which the plan is to be prepared. Marketing planning process is done at the product level. The "product" can be anything: a company, a department of a corporation, a church, a checking account, a dishwasher, a toothpaste or any type of service. The program offers the possibility to prepare a plan for several products but each plan is independent of the other because each "product" needs an independent marketing strategy. During the description of the program, the term product is used as a generic term for the above described goods and services.

for which past data is available and the number of future years the plan is to be prepared for. The number of future years used in the plan is called the planning period. The last year of the planning period is marked EOP, or end of planning period. Business plans are usually three to five year plans depending on the company and on the type of product.

The third user defined criterium is the geographic units. Business analysis and planning breaks down the market into smaller geographic units. The definition of the geographic units depends on at which level the user is working in the organization: geographic units can be a list of clients, cities, states, or countries. For example: the user might define the geographic units by regions of the U.S.A. or by states. A regional manager will define the geographic units either by states or by counties.

Referring now to Fig. 1, a marketing planning process 10 in accordance with this invention starts in step 12 with the overall market analysis. First, the overall market size of the product is determined, then the trend is analyzed with the aid of different statistical methods. The analysis is carried out at geographic units level which were defined during the program setup. After analyzing the overall market, the market sizes and trends are examined per consumer segment. This is the step where the identification of potential target segments (if any) takes place.

In the second step 14, the major brands of the market are defined and their market shares entered. Sales are forecast for each major brand concerning the overall market as well as per market segment; then the final target segments are selected.

In the next step 16, the financial data is stored and examined. This marketing planning process 10 is unique because it also involves financial analysis and ascribes equal importance to it. Setting financial objectives involves setting target cost of goods and profit level per product. In steps 12, 14 and 16, the tentative market share and financial objectives are defined. In step 18, the first strategic decision is made. Can the market growth guarantee sufficient sales and profits to meet objectives? The mission and objectives are determined in step 20. If the objectives meet the predetermined goals, then the process continues with 24, with the development of the marketing strategy. If the plan does not meet the desired objectives, then either the objectives need to be changed or the product needs to be withdrawn from the market. Depending on the importance of the product, lower profit levels might be acceptable. If not, in step 22, liquidation of the product will follow.

Step 24 develops a strategy for each element of a marketing mix: 26 product, 28 price, 30 distribution, 32 advertising, 34 promotion. In other words, a detailed marketing strategy is developed: definition of products and their features that will be sold, determination of the number of product types, at what prices will the products be sold, in which stores and with what kind of marketing campaign, how much will be spent on advertising and promotion and what the advertising message will be.

5 decision is made. Does the strategy confirm the realization of the projected sales and profits? If the numbers meet objectives, the program ends with step 40, and the implementation of the plan. Before implementation, the marketing plan needs to be compiled based on initial conditions and conclusions which were recorded as will be explained in their designated place provided with a corresponding chart of the marketing planning process 10.

In step 38, the user will return to step 14 and sets new sales and profit objectives. Based on the new objectives a new marketing strategy will be developed in step 24.

10 Step 12 is explained in detail as steps 50-64 in Figure 2. The task is (a) to forecast the market development, (b) to rank the geographic units according to their importance, and (c) to decide on an overall marketing strategy.

15 Step 50 in Fig. 2 displays the first chart of the program as shown in a Fig. 12a. It contains the geographic units and the years (past years going back as far as data is available) and the future years, 3 to 5 years depending on how long the planning period was defined during the program setup. The geographic units to be entered in this chart were also defined during the installation process (see Setup). The objective of step 50 is to prepare Forecast I based on the principles of a time series method.

20 After analyzing the market, step 50 forecasts the trend by using the forecast function of the marketing planning process 10 which will be described later in Fig. 11. This forecast is based on the time series method and comprise a series of statistical calculations.

25 Step 50 also calculates and displays in the chart of Fig. 12b a comparison of the market growth rate developments in unit sales and in dollar value and further calculates the difference between the two growth rates by subtracting the dollar value growth rate from the growth rate of unit sales. Fig. 12b displays only the growth rates of unit sales and the second column remains empty until the market forecast in dollar value is performed as will be explained in step 250. Step 50 further clarifies the meaning of the numbers in the difference column in Fig. 12b by displaying an explanation on the screen below the chart.

30 Step 52 performs another type of market forecast, Forecast II which is based on the multiple regression statistical method. In marketing terms, this method is called statistical demand analysis. In addition to past data, this analysis includes major factors that influence the market demand for our product.

35 Step 54 forecasts market development for the product again in a different way. This is called Forecast III of the marketing planning process 10. Step 54 functions differently depending on whether the product is a consumer durable good or packaged goods. Consumer durables, e.g., a television and household appliances, are goods with a life expectancy of one year or longer. They are purchased for long-term use and are replaced either because they break down or because a better product becomes

purchases plus additional purchases and replacement purchases during the planning period as defined in the program set-up.

The task of Fig. 12d is to forecast the number of product owners during the planning period as defined in the program set-up. Fig. 12d forecasts either the number of product owners or the saturation degree and it will calculate the other. The difference between the number of product owners in year (1) and year (2) equals the number of new product owners, or in marketing terms, the initial (unit) purchases and the number of purchases will be entered in the first column of the chart shown in Fig. 12j. This is the first step of Forecast III (Option 1) of the marketing planning process 10.

Forecast III of packaged goods is transferred from Fig. 12e to Fig. 12l, where the final forecast is prepared.

Forecast III for consumer durables continues with Option (2) in a chart as shown in Fig. 12f. In the case of Option (2), the product owners are not forecast; instead the number of products owned or, in marketing terms, the product penetration are forecast. The product (or market) penetration is the percentage of the total products owned in the consumer base. In other words, if we divide the total number of products owned by the consumer base and multiply it by 100, we get the penetration degree (a percentage).

$$\text{Penetration Degree (\%)} = \frac{\text{Number of Products Owned}}{\text{Size of Consumer Base}} \times 100$$

The chart in Fig. 12f displays in the first column (after the geographic units) the size of the consumer base (the number of consumers who have a potential need for the product) which is transferred from Fig. 12d. In the second column, the number of products owned is entered for the past years and forecast for the future years. Step 54 calculates the penetration degree based on the formula above. If the user enters the penetration degrees then step 54 calculates the number of products owned.

The total number of products owned is a key variable when step 54 develops Forecast III (Option 2) for consumer durables. The difference between the number of products owned at the end of year(1) and year(2) is the net increase in products owned which is the sum of initial and additional (unit) purchases for year (2) according to the following equations:

$$\text{Net increase in products owned} = \text{Initial} + \text{Additional Purchases}$$

Products Owned (year 1)

Step 54 continues with the chart in Fig. 12h where the third component of Forecast III of the marketing planning process 10 is calculated in the second column: the replacement purchases (or units replaced). Replacement purchases can be calculated if two variables are known: the number of products scrapped (which is a function of the average useful life of the product) and the percentage of people who are likely to replace the product when it breaks down. Products which fail or become obsolete are scrapped. Purchases to replace scrapped products (units) are called replacement purchases (or repurchases); the total number of those units which are scrapped but not replaced is called net scrappage.

Replacement purchases = % of scrapped units which are replaced

Net scrappage = Number of products scrapped - number of products replaced

Before the chart as shown in Fig. 12h is first displayed, step 54 asks the user to enter the useful life of the product in a space that appears on the screen: Average Useful Life: years. Based on the entered useful life of the product, step 54 displays the standard statistical distribution of percentage of products which will fail in each year after sale in a chart as shown below. The total number of products scrapped in a given year is a cumulative number calculated by applying the failure percentages to the corresponding previous sales figures. For example:

Average Useful Life: 4 years

Years after purchase	1	2	3	4	5	6	7	8
% Failing (scrapped)	2%	4%	10%	21%	17%	14%	13%	9%

After the useful life of the product and the failure percentages are entered, step 54 will display a chart as shown in Fig. 12h. In the first column, after geographic units, the total number of units scrapped in the selected year is calculated based on the failure rate calculation as shown above. In the third column, the user enters the percentage of scrapped units which are replaced. This percentage is available through market research. Next, step 54 calculates the replacement purchases which equal the percentage of scrapped units, i.e.

Replacement purchases = (Number of scrapped units x Replacement %) / 100

In the last column of Fig. 12h, step 54 calculates the 'net scrappage' which is the number of scrapped units which are not replaced.

The chart in Fig. 12i gives an overview of the development of replacement purchases for analytical purposes. Step 54 finalizes Forecast III of the marketing planning process 10 for consumer durables in the chart as shown in Fig. 12j. Forecast III, step 54 calculates in Fig. 12j the total market size of a consumer durable good by adding up the number of initial purchases (the number of units bought by first-time owners), additional purchases (the number of units bought by people who

ones).

Step 56 prepares the final market forecast year by year in the chart as shown in Fig. 12l. The first column (after geographic units) shows the current market data for reference. Then the three
 5 forecast values are displayed. Forecast I values were prepared by step 50 in Fig. 12a; Forecast II by step 52 in Fig. 12c and Forecast III by step 54 in Figs. 12d to 12k.

The user compares the three market forecasts and based on his or her own knowledge of the market enters the final forecast numbers in the last column.

Step 58 continues with an overview of the projected market development (Fig. 12l) over the
 10 planning period. The overview is presented in the same type of chart as shown in Fig. 12a. Once the numbers are transferred from Fig. 12l, step 58 calculates the growth rates just as in Fig. 12a.

The marketing planning process 10 continues with Step 60 which is the analysis of the market trend according to the product life cycle. This marketing method divides a product's life into four phases: introduction, growth, maturity, and decline. Each phase of the life cycle requires a different
 15 marketing strategy. To learn which phase of market development a product is in, is the key to successful marketing planning. Step 60 divides the screen into two: on the top of the screen, the standard S-shaped product curve is displayed. On the bottom half, step 60 plots the product's life curve per geographic unit during the planning period. Each geographic unit is classified (the user compares the two curves on the screen and makes a personal judgement) according to the product's
 20 life cycle and the classification is recorded at the bottom of the screen by selecting the corresponding letter: I(Introduction), G(Growth), M(Mature), D(Decline) from the list after hitting the appropriate key. This classification is transferred to step 62 when the overall market strategy is developed.

The purpose of step 62 is to determine the basic marketing approach. The chart as shown in Fig. 12m displays all the necessary information: the result of step 60, the market maturity
 25 classification is found in the first column (after geographic units), the market forecast for the end of planning period (second column), the share of each geographic unit of the market at the end of planning period (third column), the growth rate per during the planning period (fourth column), the rank of the geographic unit in the market expressed in dollar value (fifth column), the current market size (sixth column) and the current share of each geographic unit (seventh column). The user ranks the
 30 geographic units in the last column according to their importance to the brand. The purpose of this ranking is to establish an order of preference for the geographic units where the brand will concentrate its marketing efforts during the planning period. Step 62 makes only a primary selection which will be revised continuously during the marketing planning process 10.

Step 62 uses this ranked order in the next chart, Fig. 12n, for displaying the geographic units.
 35 It also shows all the key pieces of information for determining the marketing approach: the market maturity classification (first column), the brand share and rank (derived from step 100 shown in Fig.

100 is carried out in Fig. 3).

The user's task is to determine the general marketing approach in each geographic unit and mark the appropriate column with an 'x'. The user can select one of the four market strategy options:
 5 market share growth, maintaining share, harvesting the market and terminating the brand as marked in the last four columns of Fig. 12n.

During the planning year, step 64 monitors the market development as shown in Figures 12o and 12p. Whether the market will be monitored on a weekly, monthly, or quarterly basis depends on the product category and on the brand.

10 In Fig. 12o, on the top of the chart, the user first selects the period (week, month), then the consumer segment (market development will be monitored per target segment - see description in step 66) by hitting the appropriate keys, then step 64 enters the planned sales figures in units per geographic unit in the first row and then the actual numbers in the second. Step 64 calculates the difference in the third row of each geographic unit. Once the price development is entered in Fig. 16a,
 15 step 64 will calculate the actual market sales in dollar value as well, and the planner will have the opportunity to switch back and forth between the two displays (sales in units and in dollars) of the same chart.

In Fig. 12p, step 64 summarizes the planned and actual market sales numbers on a year-to-date (y-t-d) basis in the first set of columns, and then per period which can be month or quarter
 20 depending on the selection.

The final substep within step 12 is step 66, which breaks down the market into consumer segments. The purpose of the analysis is to look for consumer segments which demand a different product or a different marketing mix. Many criteria can be used for consumer segmentation: (1) demographics are population measurements like age, marital status, household size, number of
 25 children, and education; (2) geography is a subsegment of demographics that tells the country, area or city where a person lives, works or buys products; (3) life style (also called psychographics) describes how a person lives and is a less precise measure than the previous two criteria.

Before the chart as shown in Fig. 12r is displayed, Step 66 lists the most frequently used types of segmentation. Any new types may be added. The user selects one from the list by using the cursor.
 30 When the chart is displayed, the total market numbers are already entered. These numbers were transferred from step 50 as shown in Fig. 12a (past data) and step 56 as shown in Fig. 12l (future data). Here the size of segments (first column of Fig. 12r) and the market size by segment (second column) are entered, and the future projected either by using the forecast function (F7 key) of the marketing planning process 10, or by entering data. The task of step 66 is to make an initial selection
 35 of potential market segments for the brand in a chart shown in Fig. 12s. Here, step 66 lists the 10 largest subsegments according to market size and displays the market figures in the current year and at the end of planning period (EOP). In the second column of Fig. 12s under both years, step 66

in dollar (unit) sales.

The final selection of target segments will be revised during the marketing planning process 10 by step 120 and step 206. Step 66 displays in Fig. 12t the market development overview of the 10 largest segments in one geographic unit. In the last overview, step 66 displays the market development in one subsegment in all geographic units during the planning period as shown in Fig. 12u.

In summary, step 12 analyzed the market development in unit sales of the product, forecasted its development, ranked the geographic units and identified the most important ones on which the brands' marketing efforts should concentrate, and determined the general approach to marketing strategy development per geographic unit. Finally, step 12 also analyzed the market development in unit sales per consumer segment and made suggestions for probable target segments.

Step 14 is explained in detail as steps 100-124 in Figure 3. The aim of step 14 is to analyze the competitive market position of a brand, identify related target consumer segments (if any) and set sales and market share objectives for the planning period as defined in the set-up.

Step 100 starts with identifying the brands which play a major role in the market of the product category. A brand is the name under which a corporation sells its products in the marketplace. There are competing brands within a product category. A competing brand is any brand (even another brand of the same corporation) that consumers could substitute for the brand of the marketing planning process 10. The brand names are entered in the column headings of a chart as shown in Fig. 13a. The purpose of Fig. 13a is to identify who are the major competitors, who can take share from the brand, and whose share the brand can take. Brand sales are entered in sales units and step 100 calculates the shares of the individual brands. Brand share is the percentage of a brand's sales in the total market.

Brand share % = Brand sales / Market sales x100

Step 100 also forecasts brand sales development based on the current trend for the planning period. In order to understand the brand's competitive position in the marketplace, step 100 rearranges the numbers of the chart shown in Fig. 13a into four different charts shown in Figures 13b, c, d and e.

Step 102 is used only for packaged goods. It analyzes the development of consumers per brand and their average consumption. This analysis is similar to the one that was used for market analysis in Fig. 12e; it is only done at the brand level. Consequently, Fig. 13f is similar to Fig. 12e. The purpose of step 102 is to better understand the competitive dynamics of the market.

When the chart as shown in Fig. 13f is displayed, it already contains the sales figures for the selected brand (marked on top of the chart and selected in Fig. 13a by putting the cursor in the appropriate column) in all the geographic units for the current and past years. Then the number of

geographic unit:

Brand sales = Number of consumers x average consumption

Step 102 rearranges the data entered in Fig. 13f in two different ways in charts as shown in Fig. 13g and Fig. 13h in order to reveal a better insight into the competitive situation. Both charts work the same way, only the displayed data is different depending on which two of the three variables (geographic unit, brand or consumer segment) are selected.

Step 104 has the following three tasks: (1) to develop market share objectives, (2) identify major competitor per geographic unit, and (3) to prioritize the geographic units for marketing investments. When the chart as shown in Fig. 13i is displayed, it is already filled in with the information necessary for accomplishing the tasks. On top of the chart, the brand name is shown and the last year of the planning period. The user may change these settings by hitting the appropriate keys. Step 104 lists the geographic units according to their importance as defined in step 62. In the first column the following strategy indications which were selected in Fig. 12n are displayed: G (Grow share), M (Maintain share), H (Harvest position), T (Terminate). Columns 3 and 4 show the market size and the share of the geographic unit for the planning year that is marked on the top of the chart (the information is transferred from step 56). The next three columns show the brand sales, the share of the geographic units in the brand sales and the brand share for the current year (from Fig. 13a). In columns 8, 9, and 10, the user enters the sales objectives for the brand year by year for each planning year.

Columns 8, 9 and 10 work as a calculator since the three columns are interdependent. When brand sales are entered, then step 104 automatically calculates the shares of the geographic units in the total brand sales (column percentage vertically, where total brand sales equals 100%) and the brand shares in a geographic unit which is calculated by dividing brand sales by market sales and multiplying it by 100. If the brand shares are entered, then step 104 calculates the other two variables, the brand sales and the shares of the geographic units.

Once brand sales and share objectives are set, step 104 continues with rearranging the objectives in another chart as shown in Fig. 13j. Here, step 104 displays the geographic units in two groups. First, it shows those geographic units where the brand has a strong position then those where action is needed. Strong geographic units are those, where the brand's sales ranking number is identical with market sales ranking number and the brand has average or higher market share. Action is needed in those geographic units where the brand's sales ranking number is lower than the market ranking number or we have lower than average market share. In order to further explain the brand's position, Fig. 13j displays in column 2, the ranking number of the geographic unit in market sales and the brand share percentage in column 3. The forth and fifth columns respectively names the most important competitor and displays its brand share percentage.

average consumption per brand in a similar chart as shown in Fig. 13f. The chart contains three variables: brand users, average consumption and brand sales. Step 104 transfers the brand sales forecast from Fig. 13i. The user enters either the average consumption or the number of consumers and step 104 will calculate the other.

Step 106 displays the forecast sales of each major brand and offer final adjustment possibilities in a similar chart as was shown in Fig. 13a. Further step 106 allows the user to review the objectives in four analytical charts, similar to Figures 13b, 13c, 13d and 13e (see description step 100).

Step 108 displays an overview of the expected changes in brand shares during the planning period in a chart shown in Fig. 13k. Step 110 displays a combined overview of market and brand sales and shares development during the planning period in a chart shown in Fig. 13l.

Step 112 summarizes the marketing objectives of the brand in a chart as shown in Fig. 13m. Step 112 compares current market and brand sales with the market and brand forecasts for the end of planning period and shows the changes in percentages. Under the "Current year" heading, in column 1, the market sales (data from step 50), in column 2, the brand sales, and in column 3 the brand shares (data from step 100) are displayed. In the next set of columns, under the heading "End of planning period", in column 4, the market sales are displayed (data from step 56) and in column 5, the change during the planning period is calculated as a percentage. Columns 6 and 7 display the brand sales (data from step 104) and calculate the change in percentage during the planning period. Columns 8 and 9, show the brand share (data from step 104) and the percentage change during the planning period.

To further analyze brand sales and share objectives, step 112 rearranges the objectives in three additional charts as shown in Fig. 13n, 13o and 13p.

Similar data will be displayed per consumer segment after step 120 will be completed. Step 114 collects data from step 116, which collects data from several steps of the marketing planning process 10 and displays it in a chart as shown in Fig. 13r. It is a summary chart, where the brand's strengths and weaknesses are displayed with reference to each element of the marketing mix (step 24). Step 114 displays the brand in col. 1 if it has a strong position and its rank among the brands in col. 2. If the brand has a weak position then it is displayed in col. 3 and its rank in col. 4.

Step 118 monitors the brand's performance (sales and shares) against the set goals per consumer segment, product type, price level and distribution channel in a chart as shown in Fig. 13s. In the first column, step 118 lists the geographic units, then in column 2 displays the planned market numbers (data transferred from step 56), then in column 3 the actual numbers are entered. In columns 4 and 5, step 118 calculates the difference, first in absolute numbers then in percentages. In columns 6, 7, 8 and 9, step 118 repeats the same data for the brand (data transferred to column 6 from step

hitting Shift key and F9), and step 118 displays the appropriate data.

When step 118 displays the chart as shown in Fig. 13s, in the first heading row shows the word "Total". This means that the market sales and brand sales refer to the total market. Step 118 also provides the same display according to consumer segment, product type, price level and distribution channel. All the user has to do is to hit Shift key F10 and select from the list.

Step 118 rearranges the planned and actual data in three other way so as to better reveal what is really happening in the marketplace. In the chart of Fig. 13t, step 118 first lists the brands in one geographic unit, then displays the planned and actual brand sales and share numbers (columns 2, 3, 6, and 7) and calculates the difference in absolute numbers and in percentages (columns 4, 5, 8 and 9). Planned data in Fig. 13t is transferred from step 104, the actual numbers were entered in Fig. 13s. The user may select any geographic unit or any consumer segment by hitting the appropriate keys.

The next chart, Fig. 13u, lists the consumer segments in one geographic unit and step 118 displays the planned and actual brand sales and share number and calculates the difference. The last chart that step 118 displays is Fig. 13v which shows the year to date planned and actual sales and share numbers. The user may select any time period and any of the variables as listed in the chart of Fig. 13s.

Step 120 analyzes the brand sales and share data per consumer segment, makes the final selection of target segments (if any) and set sales and share objectives per target segment. The segmentation categories were entered in step 66 (see description there). Step 120 analyzes brand sales per consumer segment in a chart as shown in Fig. 13w. Before the chart comes up, a list of possible segmentation categories is displayed on the screen from which the user selects the one with the cursor. Then Fig. 13w is displayed with the corresponding data transferred from step 66. Fig. 13w is similar to Fig. 13a; the only difference is that the brand sales are viewed in one geographic unit broken down according to the segmentation category. Fig. 13w shows in column 1 the subsegments of the selected segmentation category. For example: if age is selected as a segmentation category, then the subsegments will be listed as defined in step 66: 15 to 25, 26 to 50, 50 plus. In column 10 the market numbers are already filled in (from step 66) and col. 11 displays 100 as the sum of all market shares. In the last row, the total brands sales are also displayed (transferred from step 100 - past or 104 - future. Brand sales per subsegments are entered in cols. 2, 4 and 6 in units, and step 120 calculates the brand shares (cols. 3,5 and 7) and the remainder (cols. 8 and 9) for each segment. After past data was entered, step 120 forecast the sales development per brand per consumer segment by using the forecast function (based on the time series statistical method - see description in step 50, Fig. 2) of the marketing planning process 10. After reviewing the forecast brand sales projections based on current trend, the user revises them for each brand according to his or her best judgement of the market. Sales and share projections for the brand set by step 120 will be the brand's objectives for the planning period.

displays data concerning the geographic unit and brand that was selected in Fig. 13w. In the first column, step 120 lists the 10 largest subsegments (selected from all the segmentation categories for which data was entered) according to brand sales. Columns 2,3 display the unit sales of the brand and its brand share in the current year, and in column 4, step 120 quotes the current ranking number of the subsegment in the total market (data calculated in step 50) to show its relative importance in the market place. Columns 5,6 and 7 contain respectively the same information for the end of the planning period (the ranking number was calculated in step 56).

In the "Major Competitor" column, step 120 names the brand which has the highest share in that subsegment in the current year and also repeats the share percentage in parenthesis. Columns 9 and 10 of Fig. 13x display the target segment selections. In column 9, step 120 enters the first selection from step 66; in column 10, the user makes the final selection by entering an "x" in the row of the subsegment that will be used as target segments for the marketing strategy (step 24) of the planning process 10. Not every market is segmented. If there is no segmentation, then the last column of Fig. 13x remains empty.

In all the charts which display data according to consumer segments, the list of segment selection contains only the names of those subsegments which are marked here with an "x". If the user wants to analyze other subsegments then those subsegments need to be marked with an "x" here as well. Step 120 offers two overviews for further analytical purposes. In the chart as shown in Fig. 13y, a complete competitive overview is given for one subsegment. In Fig. 13w, step 120 prints out the brand sales and the total market sales in the selected subsegment in all the geographic units. In Fig. 13z, step 120 lists again the 10 most important subsegments for the brand (i.e. according to brand sales), and displays the sales numbers of all brands and the market sales in the selected geographic unit.

Step 122 shows an overview of brand sales per consumer segment in a chart as shown in Fig. 13aa. Step 122 displays in column 1 all the geographic units and then lists across as column headings all the selected target segments starting with the total market for reference. In column 1, step 122 displays the market projections (data transferred from step 56), in column 2, the brand's sales objectives, and in column 3, it calculates the brand share percentages (brand sales/market sales x 100). In columns 5,6 and 7 of Fig. 13aa, step 122 displays respectively the same information with reference to the target consumer segments.

Step 124 plays a roll only for consumer durables because it stores the data of product ownership per brand in a chart as shown in Fig. 13bb. Step 124 displays the number of products owned per brand and consumer segment in selected given geographic unit and year (the selection is done by hitting the appropriate keys).

Step 124 gives a final overview of the brand ownership in the geographic units in a chart as shown in Fig. 13dd. The users selects the brand and the consumer segment, and step 124 lists all the

brand's market share and calculates the difference between the two brand share numbers in column 5.

In summary, step 14 analyzed the market sales and shares of the major brand of the product category. The analysis was carried out twice, first at total market level and then at the level of consumer segments. Finally, step 14 analyzed the brand share in product ownership (relevant only in case of consumer durables) and compared it with the brand's market share. Next, sales and share objectives were set per geographic unit at the total market level. Then the final target segments were identified, and sales and share objectives set. And finally, the geographic units were prioritized and the target brand established per geographic unit.

Step 16 is explained in detail as steps 140-160 in Fig. 4. Step 16, which goes through a series of financial analyses is a unique feature of the marketing planning process 10 because the inclusion of this analysis, the planning process 10 attaches the same importance to the financial performance of a product as to its marketing performance. Of greatest importance is the question, whether the brand can meet corporate sales and profit objectives? Step 16 gives the answer.

The financial strategy development starts with step 140, which analyzes the major financial indicators. Step 140 analyzes the financial indicators per product type on a geographic unit basis year by year. The program come up with the following setting: the broadest level of geographic units, all products, and the current year. Before a chart as shown in Fig. 14a appears on the screen, a small chart comes up where the user enters the trade discount percentages for each set of the three columns, that include the product, Unit I and Unit II.

	YEAR			YEAR		
	PROD. TYPE	UNIT I	UNIT II	PROD. TYPE	UNIT I	UNIT II
DISCOUNT						

When referring to brand sales, the marketing planning process 10, uses retail sales to the consumers and not manufacturers' or wholesale sales levels. The difference between the internal sales data and the sales figures used in the marketing planning process 10 equals the trade margin, i.e., the margin of wholesalers and retailers together if there is a two level distribution. The basis of financial analysis, on the other hand, is internal company sales data. The trade margin (or discount) translates the market sales of the brand into company sales. Sales - Trade discount = Sales (for financial analysis purposes)

In Fig. 14a, step 140 lists the financial indicators in column 1. The listed indicators are standard, but they can be renamed to meet the need of a particular product, or the standard reporting system of a company.

importance to it, and that is the "Brand Contribution". The "Brand Contribution" reveals the income contribution of a product to corporate profits without indirect expenses and allocations. This is the level where products, product groups or divisions can be truly compared within a corporation because it eliminates the distorting effects of indirect expenses and allocations.

The purpose of the chart as shown in Fig. 14a is to analyze the cost structure of the product and identify the financial indicators which perform better or worse than the company norm. The "UNIT" is a custom defined variable. If there is no company norm, the user can define "UNITS" either as another product, another region or division of the corporation - anything that can serve as a meaningful basis for comparison.

Once data is entered in a chart as shown in Fig. 14a, step 140 rearranges the numbers in a chart as shown in Fig. 14b so as to facilitate easier comparison. It enables the user to see at a glance which cost or revenue item is out of line (better or worse). The basis of the comparison is the percentage each indicator represents in their corresponding sales.

Step 142 repeats the same comparison with competing brands. The chart shown in Fig. 14c is similar to Fig. 14a with the only difference that here, step 140 replaced the "UNIT" column headings with the major brands which were entered in step 100. The purpose of this comparison is to furnish information concerning the price strategy the brand can follow. One of the basic competitive strategy options is to become the low-cost producer. If the brand has a more expensive cost structure, it should not try price cutting because the competition can cut further.

Step 144 breaks down the financial indicators into cost and revenue items. This analysis is a level deeper than the previous one. Step 144 reveals which cost or revenue item within each financial indicator is responsible for the "better" or "worse" performance of a financial indicator as seen in steps 140 and 142.

In step 144, the users renames the various cost and revenue items within each indicator before the data is entered. Under "Marketing Expenses", data for "Advertising" and "Promotion" are entered from steps 30 and 32.

In addition to the financial indicators used by step 16, step 144 also compares the product's performance to the hurdle rate. After "Business Income", step 144 lists the variable "Hurdle Rate" which is the target profit percentage of the company. Many company sets a hurdle rate as the minimum profit target for a product. Should a product not meet the hurdle rate, it will be probably withdrawn from the market. In the last row of Fig. 14d, step 144 deducts the hurdle rate from business income and enters the difference.

Step 144 also rearranges the data entered in Fig. 14d in two different ways. First, it prints out the revenue and cost items which perform better or worse than the "UNIT" to which the product is compared in a chart as shown in Fig. 14b (see description in step 140). Then in a second chart as

chart in Fig. 14e, works exactly like Fig. 14a with the only difference being that the "UNITS" are replaced by product types. The number of product types are determined in step 26 and the sales data is transferred from there.

5 Step 146 is a side step where a standard break-even analysis is performed in a set of charts as shown in Fig. 14f. The purpose of a break-even analysis is to pinpoint the number of units that must be sold before profit is made at the planned expenditure level of capital resources. This analysis is based on the relationship among sales, revenue, fixed costs, and variable expenses.

10 The next step 148 makes different profitability projections by allowing to change two key variables, sales and the discount rate. Step 148 displays a chart as shown in Fig. 14g where the user can change the geographic unit, the year and the product type by hitting the appropriate keys. On the left side the financial indicators are listed. In the first column the product's current financial overview is displayed (data transferred from step 142). At the bottom of the charts, there are two variables, "Sales Increase %" and the "Discount Rate %", that the user need to enter. The purpose of this chart is to facilitate "what-if" calculations, consequently, the two variables can be changed several times. Once these variables are entered, step 148 calculates in the columns under the heading "Version I", Version II" and "Version III" by increasing sales with the entered percentage and adjusting them with the discount rate. The chart in Fig. 14g works as a financial calculator. It translates the different sales levels into bottom line figures in seconds by using the same absolute expense amounts for the calculation. The only exception is, of course, the cost of goods, which is treated as a variable cost; it thus remains the same percentage of sales throughout the calculation.

20 Step 150 compares the profitability of the product per geographic unit, product type, consumer segment and distribution channel in four charts as shown in Figs. 14h, 14i, 14j, 14k. The chart in Fig. 14h is similar to chart 14d; the only difference is that it does not detail the cost items after "Brand Contribution", just displays "Business Income" for reference. As explained in step 140, the basis for the comparison of financial performance within a corporation should always be the "Brand Contribution", since this is the level where expenses directly attributable to a product can be measured, thus eliminating the distorting effects of indirect costs and allocations. Step 150 shows the same first column in all of these four charts. In Fig. 14h, it displays the geographic units in the other columns for comparison. In Fig. 14i, the product types are compared, in Fig. 14j the consumer segments are compared and in Fig. 14k the distribution channels are compared. All data to be compared is transferred from step 144.

30 The chart shown in Fig. 14l is similar with the one in Fig. 14d with the only difference being that after displaying current year data (from Fig. 14d), step 152 shows the years of the planning period in the column headings for the user to enter, and in col. 2 it calculates the percentage each indicator represents of total sales. Step 16, financial strategy development, starts with setting objectives first for

period (from current year to end of planning period).

Step 160 monitors the development of the financial indicators on a monthly or quarterly and gives a year-to-date overview in a chart as shown in Fig. 14s. The user can select: the geographic unit, the time period, the distribution channel and the product type by hitting the appropriate keys. Step 160 displays the financial indicators in column 1. In column 2, step 160 shows the planned numbers on a year-to-date basis. The user enters the actual numbers in column 3, and step 160 calculates the difference in absolute numbers (column 4) and in percentages (column 5). In columns 6, 7, 8 and 9, step 160 repeats the same calculations for the selected time period. Planned numbers for the time period, or year-to-date are calculated from the yearly targets based on an equal distribution during the year. Once the actual numbers are entered, step 160 rearranges them in a chart as shown in Fig. 14v. Depending on which indicator the user has the cursor on in Fig. 14s, the chart in Fig. 14v will display the development of that indicator in all the geographic units.

In summary, step 16 analyzes the financial indicators and within them each cost and revenue items for each product type and geographic unit. Additional analyses were performed per consumer segment and distribution channel. Then the user sets financial objectives per cost and revenue item for the planning period. These objectives were summarized in several charts so as to provide a better insight. Finally, step 16 monitors the development of the financial indicators during the planning period so as to alert the user to make changes is necessary.

When plans are developed, the most important question is whether the projected sales and profit levels meet the objectives of the corporation or the investor depending on for whom the plan is prepared. The marketing planning process 10 suggests two methods for decision making. As shown in Fig. 1, the first occurs in step 18, after the market forecast has been prepared in step 12, sales objectives have been set in step 14, and profit defined under current expenditure pattern in step 16. The second occurs after the marketing strategy has been developed, and when step 24 redefines profit.

By the time the user arrives at step 18 as shown in Fig. 1, the marketing planning process 10 has indicated whether the market growth can guarantee sufficient sales and profits to meet the predefined objectives. If yes, then the program continues with step 24, where the marketing strategy is developed. If not, then the program continues with step 20, where the objectives need to be revalued.

Still referring to Fig. 1, the task in step 20 is to decide whether the product is important enough to the corporation so as to accept a lower profit margin. If the product is not vital to the corporation, i.e. lower profit margins will not be acceptable, then the marketing planning process 10 continues with step 22, where the marketing planning process 10 is exited. Step 22 can be either radical, like selling the division, or stopping the product immediately, in which case the planning process stops. Alternatively, it can be a multi-year project. In the latter case, the planning process continues with step 24, where a marketing strategy is developed; the aim of such a strategy will be to

is explained in five steps, steps 26, 28, 30, 32 and 34.

In step 26 of Fig. 1, product analysis and strategy development is explained in detail as steps 200 to 220 in Fig. 5. The marketing strategy development begins with product strategy development.

5 Whether the plan is going to be prepared for a new product introduction or for one that has been on the market for years does not matter, the same steps must be followed if the aim is to develop a successful marketing strategy. The objective of step 26 is to develop a product strategy which will appeal to a large enough consumer group to realize the brand sales and profit targets. The task of step 26 is thus to identify an unsatisfied consumer need and have a product developed to fulfill such need.

10 The product strategy development starts with step 200, with the analysis of the market environment.

Step 200 displays a chart as shown in Fig. 15a, where in column 1 all of the markets are listed that belong to the same market environment as the product of the marketing planning process 10. The markets are usually defined in consumer needs. For example, if the user is preparing a plan for a hair
15 dryer then the market environment can be defined as "personal care" or "beauty care" or "hair care". Depending on the market environment definition, the listed markets will be different. In the last row, the user enters the name of the "Consumer Base" by hitting the appropriate key.(See description of the "Consumer Base" in step 54.).

In column 2 of Fig. 15a, the number of consumers of each market is entered per geographic
20 unit in a given year. In column 4, the market size is entered and step 200 will calculate the market size per consumer by dividing the market size by the number of consumers in column 6. Based on this analysis, in column 7 of Fig. 15a, the products are classified: an "x" is entered to those markets which will be further analyzed in step 202 - these markets refer to consumer needs which can be satisfied by one product; a "y" is entered for those products which will be ignored at this point but a separate plan
25 will be developed for them later on; and those markets in which the brand does not participate but might represent a threat to the product, will be marked with a "z".

Step 200 ranks the markets according to the three variables of Fig. 15a: market size, number of consumers, and market per consumer in three different charts on the same screen, as shown in Fig. 15b. In addition to sorting the variables, step 200 also provides four overviews of the data entered in
30 Fig. 15a. The first overview displays the development of the market size of the submarkets in one geographic unit in a chart shown in Fig. 15c.

Step 200 also provides two similar overviews of "consumer value" in column 6 of Fig. 15a. In the first chart, similar to Fig. 15c, step 200 displays the year to year development of the consumer value for all the submarkets in one geographic unit. (The geographic unit is the same as selected in
35 Fig. 15a.) In a second chart similar to the one as shown in Fig. 15d, step 200 lists the consumer value development of one submarket in all the geographic units. The submarket is selected by putting the cursor on the appropriate row in Fig. 15a.

"x" in step 200, will be further analyzed. Consumer need analysis comprises the steps of identifying the attributes that the product must fulfill to meet consumer satisfaction. In the car market, for example, the consumer need is transportation (to get from one place to another) and the attributes are speed and safety. The next step is entering the name of alternate products that can satisfy the same need. In the case of transportation, they can be, bicycle, motorcycle or public transportation. The aim of this analysis is to learn whether there is an alternate product that can jeopardize the market position of the brand.

First, the product attributes are entered per consumer need in column 1. In the headings of columns 3 and 4, the names of the alternate products are entered. Once the chart is properly set up, then the product attributes are evaluated on a 1 to 5 scale, where 5 is the best and 1 is the lowest value. The data is usually available through market research. First, step 202 displays the name of the alternate product that scored better than the product, in column 5, and then a "y" (for yes) or an "n" (for no) indicating whether the attribute provides a marketing opportunity for the product category. Marketing opportunity exists if none of the alternate products scored (5) on the attribute. In column 7, the most important product attributes are ranked. Only the ranked attribute will go to step 204 for further analysis.

Step 202 rearranges the data entered in Fig. 15e in two charts to better reveal their marketing meaning. In the chart as shown in Fig. 15f, the products are ranked according to which product scored best on the attribute. The chart in Fig. 15g is similar only in that the product attributes are ranked per product. After the ranking, the marketing opportunity (y/n) evaluation is repeated. In the last column, step 202 transfers the scores from Fig. 15e. Both charts show the geographic unit, year and consumer segment as selected in Fig. 15e.

Step 204 transfers the product attributes from step 202 in the ranked order (only those which were ranked) into column 1 of a chart as shown in Fig. 15h. The user's task is to evaluate to what extent each competing brand meets consumer satisfaction on each of the selected attributes. For the analysis the same 1-5 score system is used. The chart in Fig. 15h is similar to Fig. 15e.

In the analysis, step 204 includes the result of the analysis of alternate products from step 202. The highest score of the alternate products is transferred in column 2 of Fig. 15h on an attribute. Once the brands' scores per product attribute were entered, Step 204 displays the competing brand (or alternate product) that scored better than the brand in column 5. In column 6, it identifies whether or not there is a marketing opportunity for the brand with a "y" (yes) or "n" (no). There is a marketing opportunity if none of the competing brands (or alternate products) scored a (5), or none of them scored better than the brand. In column 7, the user ranks again of the product attributes according to their importance to the brand. The product attributes will be transferred in the ranking order to step 206 (only those which were ranked). In column 8, the planner enters an (x) next to the product attribute that will offer competitive advantage to the brand. (Competitive advantage is the reason why

hope for success in the marketplace.

Similarly to step 202, step 204 rearranges the brands' evaluation in two different charts. In a chart as shown in Fig. 15i, step 204 ranks the brands per product attribute, and in a chart as shown in Fig. 15j, it ranks the product attributes per brand.

Step 206 is a consumer preference analysis. It analyzes the consumer segments attitude toward the product category. The first chart of step 206 is shown in Fig. 15k. Step 206 first enters the consumer base and the target consumer segments in the column headings. There will be as many segments as were selected in step 120.

In the first row, step 206 transfers the segment size from step 54 (consumer base) and step 66 (consumer segment). In the second row, the number of current consumers is displayed (step 54). In the third row, the number of potential consumers is entered. In the next rows, under "Product Attributes", step 206 transfers the product attributes in their ranked order from step 204 (only those which were ranked) in column 1. The task in step 206 is to score the product attributes according to the importance each of the target segment attaches to them. In the last row under "Product Attributes", "Price" is entered. Price is always a product attribute. In the last row, the user enters an (x) to reaffirm that the segment will indeed be considered a target segment for the marketing strategy development (step 24).

Step 206 rearranges the scores of Fig. 15k in two charts similar to the one in Fig. 15l. First, step 206 ranks the product attributes per consumer segment, and in a similar second chart, it ranks the consumer segments per product attribute. In column 2, the scores are transferred from Fig. 15k. Both charts show the geographic unit and year as selected in Fig. 15k.

The process described in steps 202, 204 and 206 is called product positioning. Product Positioning means defining the product in terms of its benefits, i.e., establishing the place we want our product or brand to have in our consumers' life. For example, Tylenol is positioned as a fast pain reliever which is gentle to the stomach; Mercedes is positioned as the most reliable luxury car.

Step 206 summarizes the evaluation of brands on the product attributes, and the importance of the product attributes to the consumers segments in three graphs revealing the position of the brands and the target segments on any two of the selected attributes (see Fig. 15m). In graph (1), the brands are positioned (step 204); the brands' positions are shown in the graph on the two selected attributes as evaluated in Fig. 15h.. In graph (2), the consumer segments are positioned according to the score of importance they gave to the same attributes. The selection of the attributes is done by hitting the appropriate key. The user can select from all the attributes that were listed in Fig. 15h. As a default, step 206 lists the first two attributes which were indicated to provide competitive advantage.

i.e., if there is a brand that has almost the same position as a consumer segment. The geographic unit and the year can be changed by hitting the appropriate keys.

In summary, step 26 prepared the product positioning strategy by going through the following steps: 1) Step 200 - Market environment study and definition of the target market, i.e., identification of the consumer need(s) the product should satisfy; 2) Step 202 - Positioning the product category within the target market against alternate products; 3) Step 204 - Positioning the brand within the product category against competing brands; and 4) Step 206 - Identifying the target consumer segments, i.e., those consumers to whom the selected needs or product attributes/features are relatively more important. This is the core of the product strategy.

Step 208 constructs the product specification. The task in step 208 is to identify product features the product has to incorporate in order to meet consumer requirements and to define the product specifications. Step 208 thus translates the product attributes that the target consumer segments require the product should fulfill into product features in a chart as shown in Fig. 15n. In column 1, Step 208 lists the product attributes in ranking order from step 204. In column 2, under Alt. Products, step 208 displays the highest rating alternate products received in step 202. The purpose of column 2 is to remind the user if there is a threat to the product from alternate ones. Columns 3, 4 ... display the brands (as many defined in step 100) and their consumer ratings per product attribute (data transferred from step 204). Between the product attributes there are empty rows for the user to fill in with the product features which satisfy the particular attribute (without regard to any currently available product).

The user's task in step 208 is to rate to what extent each brand fulfills the requirements set by consumers on each product feature. If the feature of a brand excels, it is rated with a (5). If it is acceptable then a (4), (3) and (2) are used depending on the evaluation. Features which are considered unacceptable will get a (1) and not available features get (0). In the last row, the number of products each brand sells on the market is entered.

The last group of columns display the evaluation. In column 5, step 208 enters first the brand with the highest rating for each product attribute and for each product feature. Alternate products are also included in the evaluation. In column 6, it repeats the score. Any time when the rating is not (5 = Excellent) or only alternate products or our brand were rated (5), step 208 displays a (Y) in column 7 indicating product differentiation opportunity. In the last row under "Brand" of the "Conclusions" column, step 208 displays the highest number of products carried by a brand in the product line.

Step 208 continues with the product specification development in a chart as shown in Fig. 15o with the ranking of importance of product features per consumer segment. Step 208 lists in column 1 the product features in the order as the product attributes to which they belong were ranked in Fig. 15n. In column 2 the rating of each attribute is repeated. In column 3, step 208 entered the names of the product features in the same order as in the first column. In column 4, the user ranks the

enters the ranking number, step 208 rearranges the displayed features in the ranking order for each consumer segment. This ranking of features will be transferred to step 210. In the last row, step 208 enters first the number of products in the brand's product line, then that of the reference brand.

5 After the analysis of the brand's competitive position, step 208 continues with setting the strategy in a chart as shown in Fig. 15r. In the first row of the chart, the strategy is indicated to be equal or superior role in the market place. Which role the user will select was decided in step 14 when brand sales and share objectives were determined. In some geographic units, a brand might want to play a double role, i.e., to be equal to brand (x) and superior to brand (y).

10 In column 1 of Fig. 15r, step 208 displays all the features requirements from Fig. 15n. In column 2, step 208 displays the current ratings of the brand on the particular feature. In column 3, it enters the consumer ratings needed as defined in the strategy in the heading. Step 208 uses the same system as in Fig. 15p, with the only difference being that here the best consumer rating that was given to a feature is used as a reference and not the rating of a particular brand. That is, if the user wants to
15 follow an equal strategy, step 208 enters the highest ratings per feature from column 6 of Fig. 15n, but if the user aims at superiority, it will display the highest plus one rating for each feature. In the "Number of Products" row, step 208 enters first the number of products in brand's product line, then the highest number carried by a brand in the marketplace. (data transferred from Fig. 15n, column 5).

The user's task in step 208 is to set target consumer ratings for the brand per product feature,
20 i.e., the appreciation level the brand wants to achieve among its target consumers. In column 3 of Fig. 15r, step 208 has entered the required ratings in order to meet the strategy objectives set in the chart heading (the same rating in case of an equal strategy, or plus 1 rating in case of superiority. In column 4, the user revises these ratings and sets final score objectives based on how the brand will be positioned.

25 Based on the above analyses, the product specifications are finalized in step 210 in a chart as shown in Fig. 15s. The geographic unit and the year can be selected by hitting the appropriate keys. The objective of step 210 is (1) to define the number of product types that will be marketed; (2) to determine final price and specification of each product type.

In the first column under the "Total Market" heading, step 210 displays the "Product
30 Features" and in column 2, the target "Ratings" for the product in general. (data transferred from step 208). On the top of the chart, step 210 enters the number of product types that will be marketed (data transferred from step 208).

The next group of columns 3, 4, 5 and 6 is under "Product I" heading (the user can select as many products as were defined in step 208). In column 3, step 210 transferred the data from step 252
35 (Fig. 16d) and lists all the product features that were identified on the corresponding price level (see description in step 252) and the target price in the last row. In column 4, step 210 lists the product features according to the ranked order of importance to Segment I (data from Step 208) and the target

determined previously by hitting the appropriate keys. (The number of segments were determined in step 120 and the number of price levels in step 250.)

Based on the product features listed in columns 3 and 4 (under the headings "Price" and "Consumer Segment"), the user enters in column 5, under the heading, "Final Product Specification" those product features that the product type. The user hits the Enter key, and step 210 automatically enters the name of the product feature listed in the row. In column 6, the user enters the final target consumer ratings per product feature. In the last row, the final target price per product type is entered.

Step 210 gives a complete overview of the final product specifications in a chart as shown in Fig. 15t. In Fig. 15t, step 210 displays all the product types and lists their respective features and consumer rating. The data is transferred from Fig. 15s, columns 5 and 6 per "Product Type". In the last row, the target segment and price are entered.

Step 210 finalizes the product development with an overview of the introduction of the various product types in a chart as shown in Fig. 15u. The user enters an "X" under the product type in the year and in the geographic unit when and where the product type will be introduced. This is an important information when setting sales objectives per product type in step 216.

Once the brand's product strategy is developed, step 212 compares it with the product strategy of the competing brands in an overview as shown in Fig. 15v. Step 212 displays a grid with the following column headings: brand name, target segment, brand position, product feature, reasoning, and advertising slogan. When the user places the cursor in one of the squares, a wider space opens up where the user will type in the relevant information and a summary of the previously developed product strategy is created.

The packaging strategy is developed as shown in step 214 and in Fig. 15w. Packaging is part of the marketing strategy. Step 214 lists all the aspects that need to be determined as part of the packaging strategy development. These following aspects are listed on the screen in Fig. 15w, column 1: the concept of the package, size, shape, color, material of the container (box, bottle etc.), design, text, brand mark and labeling. Under the help function, F1, the user finds a detailed description of how to develop a packaging strategy. Similarly to Fig. 15v, Fig. 15w also works as word processing. For some product after sale service is also important. Product service strategy is also an integral part of the product strategy (step 26). The service strategy is also recorded in the last row of Fig. 15w in step 214.

The task in step 216 is to establish sales levels per product type. In steps 104 and 106 of Fig. 3, the brand sales and share objectives were determined. In step 216, these objectives are broken down according to product types per geographic unit in a chart as shown in Fig. 15x. Fig. 15x can be used at different levels depending on the user's selection at the top of the chart. The user may select one brand or the "Total Market" by hitting the appropriate key. It is important that first the total market figures per product type be entered. Then, when the brand sales per product type are entered, step 216

100).

In Fig. 15x, step 216 starts with listing the geographic units as defined in the set-up in column 1, and enters the product types as determined in step 208 (this included all product types not only those which are sold by the brand) in the column headings. In columns 2, 3 and 4, under "Brand Total", step 216 transfers the data from step 100 (past data) and step 104 (future data) and calculates the share of the geographic units (percentage vertically) and the brand shares (percentage horizontally) which are 100% because this percentage refers to the sum of brand shares of the product types, and not to the brand share in the market. Under the "Product Type" headings in Fig. 15x, the sales per product type are entered in column 5. Step 216 calculates the share of the geographic unit in column 6 (percentage vertically) and the share of the product type in the brand sales in column 7 (Product Type share % = Product Type Sales / Total Brand Sales x 100). In the last two rows of Fig. 15x, the brand (or product type) share in the total market is calculated and the target price per product type is transferred from step 210 and entered. The market share of the product type is calculated as follows:

$$\text{Product Type Market Share \%} = \frac{\text{Brand sales Product Type}}{\text{Market sales per Product Type}} \times 100$$

Each product type thus has two share percentages: (1) in the sales of the brand, and (2) in the sales of the same product type of the market. Step 216 also develops sales objectives per product type in Fig. 15x. First, the total market development per product type is entered then the sales objectives. Once the sales objectives are set, step 216 shows an overview of the competitive situation per product type in a chart as shown in Fig. 15y. Fig 15y is similar to Fig. 14a with the only difference that here step 216 displays the brand sales and share figures per product type in addition to the total brand sales. (See chart description at step 100)

Whether or not the sales objectives were realistic and in harmony with the rest of the marketing strategy (step 24) will be reviewed in steps 218 and 220. Step 218 compares the planned brand sales per product type and the planned brand sales per price level in a chart as shown in Fig. 15z. The chart shows the same geographic unit, year and brand as selected in Fig. 15x. In column 1 of Fig. 15z, step 218 displays the product types as defined in step 210. In columns 2 and 3, step 218 displays the projected total market sales and the share of product types (percentage vertically) in the total market (data transferred from step 216). In columns 4,5 and 6, the price levels are entered as defined in step 250. In the total row, under the Price I, II, III headings, step 218 transfers from step 258 the data for the total brand sales per price level. Under the "Brand Sales" in columns 7, 8 and 9, step 218 displays the total number of projected sales per product type (data transferred from step 216) and calculates the share of each type in the brand sales (percentage vertically) and the market share of each type (percentage across). The cells under the "Price Level" and Product Type are empty. They can be used as a calculator to adjust the sales objectives. If the user sells only one product type per

5 serves as a check on consistency of the marketing strategy (step 24). Otherwise, the user will use the calculator function of Fig. 15z and fills in the empty cells so as the two totals (total sales per price level and total sales per product type) ultimately will add up. Step 218 cannot change the totals since they are transferred data. The matrix function of Fig. 15z gives the user the unique capability to harmonize the price (step 258) and product type strategies (step 218). The market columns (cols. 2 and 3) were included only for reference.

10 Step 220 also provides a check on the consistency of the marketing strategy (step 24) by comparing the planned sales figures per product type with the planned sales figures per consumer segment in a chart as shown in Fig. 15aa.

15 Fig. 6 provides a summary of the consumer segmentation strategy. This strategy flows through the entire program therefore it does not have an individual step in the planning process or an individual menu. If a brand decides to follow a consumer segmentation strategy, then each element of the marketing mix needs to be analyzed at consumer segment levels. A brand can thus have an overall marketing strategy without segmentation, or its product line can aim only at one or several target segments. Sometimes both strategies can be combined but that requires high level of marketing skills.

20 In summary, step 26 developed the right product for the target segments. It identified the consumer need the product should fulfill and the unique product features, which are not offered by the competition and will provide the brand with competitive advantage. Step 26 confirmed or rejected the original target segment selections obtained in step 120. Finally, the number of product types were determined and their sales and share objectives set. The monitoring of brand sales per product type is done together with monitoring the brand's overall sales in step 118.

25 Step 28 of Fig. 1b is explained in detail as steps 250-262 in Figure 7. In step 28, price development is analyzed and the price strategy is developed. Price strategy means to establish consumer prices for the brand at prices that will facilitate the sale of such goods to the end consumer. The objective of step 28 (Fig. 7) is: (a) to recommend target prices for the product types by analyzing the products currently sold on the marketplace, and (b) set sales objectives per price level.

30 Price analysis starts with step 250 in a chart as shown in Fig. 16a. Step 250 establishes first the price levels at which the product category is sold. Step 250 in Fig. 16a provides three price levels. The user may use one, two or all three. Step 250 analyzes sales development at the geographic unit level. Then past data of sales development per price level is entered by changing the year designation at the top of the chart by hitting the appropriate key. The total row of Fig. 16a already displays the total market sales (data from step 50 for the past and step 56 for the future) and the total brand sales respectively (data transferred from step 150 for the past and step 154 for the future). The price analysis can also be repeated at the consumer segment level. When sales data per price level is entered, step 250 adds up the numbers and shows the sums on the bottom of the screen in red until they equal the total numbers entered in the last row. After sales data per price level is entered, the

and step 250 calculates the other according to the following equation: Dollar sales = Unit sales x Average price

5 In columns 3, 6 and 9, step 250 calculates the share of each price level in the total sales of the market or brand (percentage vertically), and in columns 3, 6 and 9, the brand share per price level (percentage horizontally). The last task of step 250 is to forecast sales and average price development per price level over the planning period. For the forecast, the forecast function (F7) of the marketing planning process 10 can be used, or the user make his/her own estimates. The forecast average prices per price level for the brand represent the first target prices for the product types. These targets are revised several times and finalized in step 258. After the average price development forecasts, the brand sales price level is forecast in a similar way.

15 Step 250 rearranges the numbers entered in Fig. 16a in two additional charts for further analysis. In a chart as shown in Fig. 16b, step 250 lists the brands per price level according to their brand share (column 6 in Fig. 16a) and displays the brand share percentage in parenthesis for the geographic unit, year and consumer segment. In a second chart as shown in Fig. 16c, step 250 rearranges the sales figures so as to show the sales development of one brand (or the total market) n one year in all the geographic units.

20 Step 252 analyzes the second price variable as a function of the product features and the quality of the product at each price level in a chart as shown in Fig. 16d. The objective of step 252 is to recommend product specifications and target prices per price level based. The user selects the geographic unit and year, and step 252 displays in column 1 of Fig. 16d the product features that are characteristic for the current products on the market in ranked order of importance. These features were entered in step 208.

25 Fig. 16d has as many price levels as were determined in step 250. Under each price level, there are four columns. In columns 3 and 4, under the heading "Brand", the user marks those features which are currently offered by the respective brand in the marketplace at that price level. (Any brand can be selected that was defined in step 100 by hitting the appropriate key). In column 2 of Fig. 16d, under the heading, "Market", step 252 displays an (X) in the rows of those features which are offered by at least one brand. In the last row, the average price is transferred from step 250.

30 In the "New Offer" column, column 5, the user enters an (X) if the new product type at that price level should include the particular feature. The "New Offer" is next year's product line. In the last row of columns 2, 3 and 4, step 252 displays the average price transferred from step 250. In the last cell of column 5 of Fig. 16d (under "New Offer" heading), the user enters the suggested target price for the product type. The target price is determined by the two variables analyzed in Fig. 16d, namely, the competitiveness of the product features combination of the brand's product offer and the average prices of the competing brands.

product, i.e., the correlation between change in price and consumer demand. In row 1, the user enters the prices and in row 2, the corresponding sales levels. In row 3, step 252 calculates the price elasticity (sensitivity) or the yearly change in demand after a change in price. The price elasticity measures how responsive demand for the product will be to a change in price in a given period. Price and demand are inversely related, that is the higher the price the lower the demand (and conversely). Prestige goods represent an exception, their demand increases with higher prices, but only to a certain extent.

Step 254 analyzes the market development and the average price development per consumer segment in a chart as shown in Fig. 16f. The objective of step 254 is to understand the attitude of the various consumer segments toward price to forecast average price development, and to set target prices per target consumer segment. The chart in Fig. 16f has a similar structure to the chart in Fig. 16a. The main difference is that in Fig. 16f, step 254 displays data per consumer segments for comparison while in Fig. 16a sales data of the various brands were shown (see description in step 250). Step 254 ranks the importance of the consumer segments at the different price levels in a similar manner to that shown in Fig. 16b with the only difference being that there the brands were listed.

The user enters first past data as indicated, and then forecasts sales and price development per consumer segment during the planning period. These forecasts can be based either on estimates or the forecast function (F7) of the marketing process 10 can be used.

Step 256 contains the fourth aspect of price analysis, i.e., the price characteristics of the distribution channels in a chart as shown in Fig. 16g. The objective of step 256 is to identify the largest distribution channels per price segment and forecast average price development. Step 256 also checks whether the price, distribution and consumer segmentation strategies are consistent. The chart in Fig. 16g has a similar structure to the chart in Fig. 16a. The main difference is that here, step 256 displays data per distribution channel for comparison, while in Fig. 16a sales data of the various brands were shown (see description in step 250). Once past data is entered, the user forecast sales and price development per distribution channel during the planning period are calculated. The forecast can be based either on estimates or the forecast function (F7) of the marketing process 10 can be used.

Step 258 offers a final revision of the price strategy in a chart as shown in Fig. 16a (see description at step 250). The brand sales objectives per price level are transferred from step 250. Data per consumer segment is transferred from step 254. The user's task is to analyze the sales and average price development forecast and make final adjustments if needed. The future data entered in step 250 is just suggestion. The marketing planning process 10 uses the data developed in step 258 as the final objectives. If there are no adjustments, then the numbers entered in step 250 will be identical with the objectives set in step 258. If on the other hand the user changes the brand's sales forecast per price level developed in step 250, then the sales of all brands per price level might not add up to the total market and will need to be adjusted.

Step 262 monitors sales development per price level in a chart as shown in Fig. 14t and per consumer segment in a chart as shown in Fig. 14u. (See step 118).

In summary, step 28 of the marketing planning process 10 developed a price strategy by analyzing the price levels at which the product category is sold in step 250. Next, step 28 analyzed the products which are sold at the different price levels and made suggestions concerning product feature requirements and average prices for each price level in step 252. Steps 254 and 256 analyzed the price development in the target consumer segments and in the distribution channels respectively, and then forecast sales and price development at the various price levels. Finally, step 256 finalized the price strategy by setting sales and average price targets for the planning period per price level.

As shown in Fig. 8, step 30 performs a distribution analysis and strategy development as further explained in steps 300-322. Distribution analysis is very similar to market analysis. Step 30 reveals who the major distributors are, and what the brand's share is per distribution channel. Key to a successful distribution strategy is to identify the most important types of distribution, i.e., those channels where the brand can realize the highest sales volume at the least expense.

Distribution analysis begins with step 300 in a chart as shown in Fig. 17a. Fig. 17a contains all the necessary information needed for understanding the market situation and developing a successful distribution strategy.

In Fig. 17a, the user can select the geographic unit, the year and the brand. Step 300 enters only current and past data. Future data can be viewed in Fig. 17a but cannot be changed. It is transferred from step 308 and step 310. Step 300 starts with entering the types of distribution channels in which the product is currently sold, or in case of new products where the products will be sold in column 1. For example, the types of distribution channels can refer to different types of outlets like department stores, chain stores, drug stores.

The first group of columns comprises columns 2, 3, 4 and 5 under the heading of "All Distributors", i.e., the total market. In column 2, the number of outlets are entered per type of distribution. In column 3, the total sales per type of distribution is entered. In the last row, the "Total" data is already displayed from step 50. Step 300 shows the difference between the sum of the total sales per type of distribution and the number in the "Total" row in red at the bottom of the screen. The sum of total sales per type of distribution must be equal to the total market sales. In column 4, step 300 calculates the share of each type of distribution in the total market (percentage vertically). In column 5, the average sales per type of distribution is calculated by dividing total sales by the number of outlets in a type of distribution.

In Fig. 17a, the second group of columns under the heading of "Brand's Distributors" comprises columns 6, 7, 8, 9 and 10. The "Brand's Distributors" are all those selling points which sell the brand either exclusively or together with other brands. In column 6, the user enters the number of outlets where the brand is sold in each type of distribution. In column 7, step 300 calculates the

within a type of distribution that is selling the brand (percentage horizontally). In column 8, the sales volume of the brand's distributors is entered. In column 9, step 300 calculates the share of each type of distribution in the total sales of the brand's distributors (percentage vertically). In column 10, step 300 calculates the brand's market reach.

The market reach is a distribution indicator expressing the percentage of the market which is reached by the outlets selling the brand. Step 300 calculates the market reach by dividing the sales of "Brand's Distributors" (column 8 of Fig. 17a) by the total sales of the type of distribution channel (column 3) and multiplies it by 100. The objective of the above analysis is to find out, how many outlets sell the user's brand, and what role those distributors play in the total market? Market reach reveals the maximum market share potential of the brand under its current distribution pattern. If all the outlets selling the brand sold only the brand, then their market reach would equal to brand's market share. A brand cannot have higher market share than the total sales of "the brand's distributors".

The last group of columns of Fig. 17a, under the heading "Brand", comprises columns 11, 12, 13 and 14, and displays data referring to the brand which was selected at the top of the chart by hitting the appropriate key. In column 11, the brand's sales per type of distribution is entered. In the last row, the total brand sales ("Total") were transferred from step 100. Step 300 shows the difference between the sum of the total sales per type of distribution and the number in the "Total" row in red at the bottom of the screen. The sum of total sales per type of distribution must be equal to the total brand sales. In column 12, step 300 calculates the share of each type of distribution in the brand's sales (percentage vertically). In column 13, step 300 calculates the brand's market share per type of distribution channel by dividing brand sales (column 11) by total market sales (column 3) and multiplying it by 100. In column 14 of Fig. 17a, step 300 calculates the distribution share of the brand.

Distribution share shows how important the brand is to its distributors in a type of distribution, i.e., what percentage the brand's sales represent in the total sales of its distributors. Step 300 calculates the brand's distribution share by dividing the brand's sales (column 11) by the total sales of "the brand's distributors" column (6) and multiplying it by 100.

Usually, the quickest and easiest way to increase sales is to improve the brand's share with its current distributors. The distribution strategy, as developed in step 30, comprises setting market reach and distribution share objectives in step 320. These two indicators are interdependent according to the following formula:

$$\text{Market share \%} = (\text{market reach} * \text{distribution share}) / 100$$

Step 300 rearranges the data in Fig. 17a in three different charts. First in a chart as shown in Fig. 17b, step 300 ranks the types of distribution according to their importance in the total market, in the brands distributors, and in the brand's sales according to the brand's market reach and distribution share.

distribution channels (a) where the brand needs to increase its market reach by opening up new outlets; and (b) where the brand needs to increase its distribution share by selling more goods to the same distributors. Step 300 lists those types of distribution under the heading "New Distribution Channels" (needed) where the brand's market reach is average or lower, and under "Channels to Improve Share" where the brand's distribution share is average or lower.

The last overview that step 300 displays is in a chart with a similar structure to the one in Fig. 17a with the only difference being that on the top of the chart where a type of distribution is selected, and in column 1, where the geographic units are listed.

Step 302 analyzes the position of the major brands in the different types of distribution channels in a chart as shown in Fig. 17d. In Fig. 17d, only past and current data are entered and the forecast will be prepared in step 310 in an identical chart. In column 1, the types of distribution channels are listed. In the first two sets of columns, columns 2, 3, 4, 5, 6 and 7, under the heading "Total Market" and under the heading "The Brand", step 302 displays the data from step 300. Column 2 and 5 show the sales data, column 3 and 6, the share of each type of distribution channel (percentage vertically) and column 4 and 7, the brand share (percentage horizontally) which under the heading "Total Market" is, of course, 100 percent. The user enters the sales of the competing brands per type of distribution in column 8. Similarly to columns 6 and 7, step 302 calculates columns 9 and 10. In the "Total" row of column 8, the brand sales are already displayed (data transferred from step 100). The sum of brand sales per type of distribution must equal the number in the "Total" row. Step 302 displays the difference in red at the bottom of the chart, if any. Similarly to the brand's sales, the user may enter the sales also of the competing brands in step 300. In that case, Fig. 17d is filled in completely when step 302 displays it on the screen.

Step 302 rearranges the data of Fig. 17d into three charts. In a chart as shown in Fig. 17e, step 302 ranks the importance of the types of distribution per brand according to their shares in the brand sales and displays the actual share percentage in parenthesis. In a chart as shown in Fig. 17f, step 302 ranks the importance of the brands per type of distribution according to their brand shares and displays the actual share percentages in parenthesis. Finally in a chart similar to the one shown in Fig. 17a, step 302 displays an overview of the brand sales in one type of distribution channel in all the geographic units. The only difference between the charts of Fig. 17a and Fig. 17d is that here step 302 displays the name of a type of distribution on top of the chart (in place of the geographic unit), and lists all the geographic units in column 1 (instead of the type of distribution).

Steps 300 and 302 showed the user the brand's strong and weak points in the various types of distributions. Steps 304 and 306 will reveal the reason by analyzing the dealers attitudes toward the product and the other brands. Step 304 analyzes the important factors that play a role when distributors decide to stock a brand in a chart as shown in Fig. 17g. Step 304 lists the types of distribution channels in column 1 and "Factor" in the headings of columns 2, 3, 4, 5 and 6. The user's

stock a brand (market research data). These factors can be, for example, price, service, advertising support, packaging, dealer's discount, etc. and they will vary with each product. Once the names of the determining factors are entered, the user evaluates the importance of each factor in each type of distribution (market research data).

In two charts as shown in Fig. 17h and Fig. 17i, step 304 rearranges the data so as to better understand its meaning. In Fig. 17h, step 304 ranks the importance of determining factors per type of distribution. In Fig. 17i, step 302 gives an overview of the importance of the determining factors in one type of distribution in all geographic units.

Step 306 analyzes the brand image in the distribution channels in a chart as shown in Fig. 17j by using a score system from low to high, i.e., high score means a better score. The objective of step 306 is to compare the brand's services rendered to the distributors with those of the competition by evaluating each brand per determining factor. Step 306 displays the determining factors (data transferred from step 304) in column 1. Across in the column heading, the brand names are displayed from step 100. The user's task is to score each brand as to how well they perform on each factor (market research data). In column 6, under the heading "Strong/Weak", step 306 evaluates the brand's position compared to other brands. The brand's position will be judged: strong, if the brand has the highest score alone; neutral (a) if the brand share the highest score with at least another brand, or (b) if the brand is ranked number one but not on the highest score level; and weak if any other score than the above.

The primary aim of the brand will be to obtain the best score on the most important factor per distribution channel.

Step 306 rearranges the data entered in Fig. 17j in three different ways. First in a chart as shown in Fig. 17k, step 306 ranks the brands per determining factor and displays the score in parenthesis. Second as shown in Fig. 17l, step 306 displays the strengths and weaknesses of the brand in a geographic unit in a given year. Third as shown in Fig. 17m, the evaluation scores of all brands are displayed in all geographic units for one distribution type, in one year for on one determining factor. In column 6, the evaluation of the brands is shown. (see Fig. 17j).

In step 308, the distribution strategy development begins in a chart as shown in Fig. 17n. In step 308, three major tasks are performed: (a) the analysis of the major distribution channels where the target consumer segments purchase the product; (b) identification of new channels and setting strategies for them, and (c) forecast of market sales per type of distribution and consumer segment. The chart shown in Fig. 17n is similar to the one used in step 302 with the only difference being that here brand sales analysis is replaced with the analysis of the purchase patterns of the consumer segments. In column 1 of Fig. 17n, the types of distribution channels are listed. In the column headings, first the "Total Market" is displayed, and then all of the target consumer segment which were identified in step 120. If no segments were selected, then those columns remain empty. In

from step 300. In columns 5 and 8, the user enters market sales data per consumer segment. In columns 3, 6 and 9, the share of each type of distribution channel (percentage vertically) is calculated, and in columns 4, 7 and 10, the market share of the consumer segments (percentage horizontally).

- 5 The market share under the heading "Total Market" is always 100 percent. Nevertheless, the share of consumer segments may add up to more than 100% because of possible overlapping. The total purchases per consumer segment is already displayed in the "Total" row of columns 5 and 8 (data transferred from step 120). The sum of purchases per consumer segment in the types of distribution must equal the number in the "Total" row. Step 308 displays the difference at the bottom of the chart,
10 if any.

Step 308 also forecasts the sales development per type of distribution during the planning period. For the forecast, the user may use estimates or the forecast function of the marketing planning process 10 by hitting F7.

- Step 308 rearranges the data of Fig. 17n in three charts. In the first chart as shown in Fig. 17o,
15 step 308 ranks the importance of the types of distribution per consumer segment according to their shares in the consumer purchases and displays the actual share percentage in parenthesis. In the second chart as shown in Fig. 17p, step 308 ranks the importance of the consumer segments per type of distribution according to their shares and displays the actual share percentages in parenthesis. Finally, in the third chart as shown in Fig. 17r, step 308 displays an overview of the brand sales in one
20 type of distribution channel for all the geographic units. The only difference between Fig. 17r and Fig. 17n is that here step 308 displays the name of a type of distribution on top of the chart (in place of the geographic unit), and lists all the geographic units in column 1 (instead of the type of distribution). Step 308 thus enables the user to study whether the purchase pattern of a consumer segment is characteristic for all geographic units or it is only a unique phenomenon in one.

- 25 Step 310 breaks down the sales objectives of the brand (set in steps 104 and 120) per consumer segment and per type of distribution in a chart as shown in Fig. 17s. Step 310 lists the types of distribution channels including the new types (data transferred from step 308). In the column headings, step 310 enters "Total Market" and all the consumer segments which were selected in step 120. Under each major heading, there are four columns. The columns 2, 3, 6 and 7 display data of the
30 total market, and columns 4, 5, 8 and 9 display brand data. Columns 2 and 6 show total market sales (data transferred from step 300 past and step 308 future). In columns 3 and 7, step 310 calculates the share of each type of distribution in the total market sales (percentage vertically). In columns 4 and 6, the sales objectives of the brand per type of distribution per consumer segment is entered. The user may enter estimates or use the forecast function of the marketing process 10. In columns 5 and 9, step
35 310 calculates the brand share percentage per type of distribution (brand sales/market sales X100). In the "Total" row of Fig. 17s, step 310 displays the total sales of the brand (data transferred from step 100(past), step 104 (future) and step 120 per consumer segment. The brand sales objectives per type

red numbers at the bottom of the screen.

Step 310 rearranges the sales objectives entered in Fig. 17s into two charts. In a chart as shown in Fig. 17t, step 310 compares the brand's share in the total market and in a consumer segment for each type of distribution channel. In the second chart which is similar to Fig. 17s, step 310 gives an overview of the brand sales objectives in one type of distribution channel for all geographic units.

Step 312 finalizes the brand's sales objectives per distribution channel in an identical chart as shown in Fig. 17d.(see description in step 302). The objective of step 312 is to check on our sales objectives by forecasting the sales of the competing brands in the different types of distribution channels. Step 312 displays the past data from steps 300 and 302, and future data from steps 308 and 310 for the market and for the brand.

Before the sales objectives are finalized, step 314 makes a final check by comparing the brand's distribution and product strategies in a chart as shown in Fig. 17u. Step 314 displays the total market numbers (data from step 300 for the past and 308 for the future), the total brand sales per product type (data transferred from step 216) and the brand's sales projections per distribution channel (data from step 310). Step 314 calculates the percentage columns based on the market share of the distribution types (first percentage column, percentage calculated vertically and adds up to 100%), the distribution channels' shares in the brand sales (second percentage column) and the brand shares per type of distribution (last column, percentages horizontally: brand sales/market sales x 100). The user's task is to break down the brand's sales objectives per type of distribution into sales per product type and type of distribution, i.e., to divide the total sales per product type among the distribution channels. Step 314 thus harmonizes distribution and product strategies.

Step 316 displays an overview of the distribution strategy in a chart as shown in Fig. 17y.

Step 318 displays the development of the number of distribution outlets per type of distribution in a chart as shown in Fig. 17aa. In step 300, the user entered the number of outlets per type of distribution on a yearly basis. Step 318 displays the same data over the entire period in one geographic unit and calculates the yearly growth rate. In another chart as shown in Fig. 17bb, step 318 also displays the development of the number of outlets over the planning period, but this time, for all of the geographic units after the type of distribution was selected (in Fig. 17aa). The planner's task in step 318 is to forecast the development of the number of units during the planning period. Estimates may be entered, or the user may use the forecast function of the marketing planning process 10.

Step 320 sets distribution objectives, i.e., strategies the user must follow in order to attain the sales objectives developed in step 310 as shown in a chart of Fig. 17cc. Setting distribution objectives means to determine the necessary market reach, distribution share and number of outlets objectives (see explanation in step 300). The objectives are developed on a geographic unit basis year by year. Fig. 17cc displays the types of distribution in column 1. In column 2, the projected market sales figures are displayed per type of distribution as forecast in step 308. In column 3, step 320 calculates

5 display the market reach, first in the current year, and then lets the user enter the target market reach percentages for the year marked in the column heading. Columns 6 and 7 display the distribution share percentages. Column 6 shows the current year's distribution share and in column 7, step 320
 5 calculates the brand's distribution share based on the market reach objective entered in column 5, since the two indices are interdependent and both are a function of brand sales which is displayed in column 8. In columns 9 and 10 of Fig. 17cc, step 320 calculates the share of each type of distribution in the brand sales (percentage vertically) and the brand share in each type of distribution (brand sales/market sales x 100). The interdependence of brand share, market reach and distribution share is
 10 shown in the following formulas:

$$\text{Market share} = \frac{\text{Market reach} * \text{Distribution share}}{100}$$

and

$$\text{Brand sales} = \frac{\text{Total market} * \text{Brand share}}{100}$$

When setting objectives for market reach and distribution share, the user actually defines what really needs to be done in order to meet the sales targets, i.e., to what extent the brand needs to
 20 acquire new distribution channels (to increase market reach) and to what extent it needs to increase its share with the current distributors.

Step 320 provides a final check on how realistic the distribution strategy objectives are by displaying an overview of the market reach and distribution share objectives for one type of distribution but in all geographic units in a chart similar to Fig. 17cc.

25 The third distribution strategy indicator is the number of outlets that step 320 determines in a chart as shown in Fig. 17dd. Based on the brand's market reach and the distribution share objectives, step 320 fills in this chart of Fig. 17dd completely by transferring data from Fig. 17cc. Step 320 calculates the number of outlets needed to meet the brand's sales objectives by using the brand's current average sales per outlet according to the following formula:

$$\text{Number of outlets needed} = \frac{\text{Total brand sales (in units)}}{\text{Average number of units sold}}$$

The brand sales, which were determined in step 310, are constant in step 320. The user can thus change only the other variable of the equation, the average number of units sold per outlet. There

- (1) by concentrating at the larger distributors, i.e., outlets with a higher average number of units sold, or (2) by increasing the brand's distribution share, i.e., the number of units the brand sold per outlet. The larger the outlet average sales, the lower distribution share the brand needs to meet the same brand sales objectives. The two variables are thus inversely related. The average number of brand sales is calculated by the following formula:

$$\text{Average number of brand sales} = (\text{Average number of units sold (all brands)} \times \text{Distr. Share \%})/100$$

- In Fig. 17dd, the distribution share, which was determined in Fig. 17cc, is constant. Here, the user's only option is to change the distribution channels' average number of units sold where the brand is sold, i.e., to sell the brand in those outlets which have a higher volume. In column 1, the types of distribution are listed. In columns 2 and 3, step 320 displays the following market data: total number of outlets and their average sales (all brands) transferred from step 300 (past) and step 318 (future). Columns 4 and 5 show the same data for the brand's distributors, namely, the number of outlets currently selling the band and their average sales. In the "Outlets Needed" columns, columns 6 and 7, step 320 calculates how many outlets the brand would need if its distributors would remain the same, i.e., their average sales per outlet would not change and the average sales under "Outlets Current" are the same as under "Outlets Needed" - data transferred from step 300. The number of needed outlets is calculated as:

20	Brand	sales	target	for	the	selected
	year					
	Number of outlets needed	=	-----			
			Current average sales of the brand's distributors			

- 25 In column 8, step 320 calculates the difference between the current number of outlets and the number of outlets the brand needed to meet its sales targets. In column 9, step 320 displays the brand's average sales per outlets, which is also a calculated value and is a function of the average sales of its distributors. The brand's average sales per outlet is calculated as:

$$\text{Brand's average sales per outlet} = (\text{Outlet's average sales} \times \text{Brand's distribution share \%})/100$$

- 35 The user's task in Fig. 17dd is to set average sales targets for the brand's distributors. If the user changes the average number of units sold per type of outlet, then both of the following indicators will also change accordingly: (a) the number of outlets needed, and (b) the brand's average sales per outlet. Changing the number in one column will recalculate two strategic indicators automatically, whereby the user will continue to change the average sales of the distributors as long as the brand's average sales targets do not seem realistic. The "Difference" column, column 8 in Fig. 17dd, was

objectives given the set market reach and distribution share targets.

Finally, step 320 gives an overview of the number of outlets needed for the brand to meet its sales objectives in one type of distribution channel for all geographic units. The chart is similar to Fig. 17dd but it changes the axes by showing one type of distribution channel at the top of the chart and all geographic units in column 1. In a chart similar to 14dd, step 322 monitors the brand sales and share development per type of distribution. See the description in step 118.

In summary, step 30 of the marketing process 10 analyzes the current distribution pattern of the product. Step 300 identifies the major outlets and calculates the brand's market reach and distribution share. Then, steps 304 and 306 analyzes the distributors' attitude toward the brands. Next, steps 308, 310 and 312 develop a market forecast for each type of distribution and consumer segment and set sales objectives for the brand. Finally, step 320 sets distribution objectives for market reach, distribution share and number of outlets. Step 322 monitors sales development per distribution channel during the planning year.

Step 32, the development of the advertising strategy is further explained in steps 350 to 364 of Figure 9. The objective of advertising strategy is to convey a message to the target audience.

Step 350 starts with establishing which media are currently used for advertising the product and how much the major brand has spent in each medium in a chart as shown in Fig. 18a. In Fig. 18a, the highest level of geographic unit is treated as an individual unit because there are media campaigns which cover the entire territory. The total media spending is thus the sum of media spending in all geographic units including the highest level. Step 350 lists "Medium I" in column 1. The user renames the lines by entering the names of the actual media used and enters additional ones if necessary. Step 350 enters the names of the major brands in the column headings as defined in step 100 including the total market. Once the amount spent in each medium by each brand is entered, step 350 calculates the share of each medium in the total spending of each brand (percentage vertically).

Below the "Total" line, step 350 calculates an important advertising concept, namely, the "Share of Voice" (S.O.V) percentage which is the percentage of the media expenditure of a brand in the total media expenditure according to the following formula:

$$\text{Share of Voice} = \frac{\text{Media expenditure of a brand}}{\text{Total media expenditure}} \times 100$$

In the last line, step 350 displays the brand shares in the total market (data transferred from step 100 for the past and 104 for the future).

of media spending per brand based on a current trend. The user can enter estimates or use the forecast function of the marketing process 10.

Step 350 aids in analyzing the meaning of the media spending per brand by rearranging the data entered in Fig. 18a in four subsequent charts. In a chart as shown in Fig. 18b, step 350 compares a brand's share of voice and market share rank. Step 350 lists the various brands according to the size of their media expenditures in column 1, and the actual amount spent in column 2. In columns 3 and 4 of Fig. 18b, step 350 compares S.O.V and the brand share percentages of each brand. In column 5, step 350 displays the ranking number of the brand according to brand share. Theoretically, the brand share and the S.O.V ranking of a brand should be the same, i.e., the brand with the highest brand share is "supposed" to spend most on advertising.

Many companies use the Share of Voice for determining the size of their media budget. The marketing planning process 10 advises against it. S.O.V. provides important guidelines, but it should not be used as the only criterion for spending level decisions because it excludes other innumerable factors which influence the efficiency of our advertising. Even the basis of this calculation, namely, the total amount of spending by all brands, might not be correct.

In a chart as shown in Fig. 18c, step 350 ranks the brands per medium according to the amount spent. In a similar chart, step 350 changes the axis, and ranks all media per brand. Finally, in a chart as shown in Fig. 18d, step 350 gives an overview of media spending of the brands in one medium for all geographic units. The structure of the chart is identical with the one in Fig. 18a.

Steps 352 and 353 belong together. Step 352 analyzes the consumer purchase steps model of the product in a chart as shown in Fig. 18e and step 353 sets objectives in a chart as shown in Fig. 18g. Deciding to make a purchase and selecting a particular brand is a multistep process. The objective of step 352 is to measure each of the following steps: awareness, acceptance, preference and purchase levels among the various consumer segments, and to identify which of these purchase steps to emphasize in the brand's advertising campaigns. In column 1, the geographic units are listed as defined in the set-up. In the column headings, the following purchase steps are listed: awareness, acceptance, preference and purchase level. Under each column heading, all the major brands are displayed which were defined in step 100.

Each user will have his or her own definition of purchase steps. The definition in itself is irrelevant. It is only important that the same definition should be used over the years when market research is carried out.

The purchase steps are measured in percentages of the consumer base (as defined in step 54). For example, 5% level of acceptance means that 5% of the consumer base finds the brand's product acceptable. In Fig. 30e, step 352 does not calculate the purchase level but uses the same research data as used for the other steps.

percentages are based on the awareness level. Consequently, they express what percentage of the consumers who are aware of, would accept, prefer or purchase the brand. The line always shows the index for the geographic unit on which the cursor is placed. The index is a more accurate measure of the correlation among the indicators than the actual percentages based on the "consumer base". The user's task is to forecast the development of the purchase steps. The forecast numbers can be entered (research data or estimates) or the forecast function of the marketing planning process 10 can be used.

Step 352 also rearranges the data entered in Fig. 18e in a chart as shown in Fig. 18f to facilitate further analysis. In Fig. 18f, step 352 lists the geographic units, then in the following columns, it compares the selected brand's actual percentage and rank with regard to the following six major indicators: market share (data transferred from step 100 (past) and step 104 future), Share of Voice (data from step 350), awareness, acceptance, preference and purchase level ranks (data from Fig. 18e).

Step 353 sets advertising goals in a chart as shown in Fig. 18g. In column 1, the years of the planning period are listed as defined in the set-up. In the next three column headings, step 353 enters the three indicators for which the user needs to set the following advertising objectives: awareness, acceptance and preference levels. Data for the current year is also entered from step 352. In column 7, step 353 calculates the projected purchase levels based on the sales objectives set in step 104 and the Consumer Base as determined in step 54 in accordance with the following formula:

$$\text{Purchase level \%} = \frac{\text{Sales} / \text{Purchase frequency}}{\text{Consumer Base}} \times 100$$

The purchase level in step 353 is different from the one used in step 352 because each has a different source. Step 352 uses market research data for consistency within the chart. In step 353, on the other hand, the user's task is to set actual advertising objectives to meet sales targets; consequently, the actual data (calculated) becomes more relevant.

Under the headings acceptance and preference and purchase level, there are two columns. In columns 3, 5 and 7, step 353 displays the actual percentage goals, i.e., the percentage of the consumer base who accepts, prefers and purchases the brand, and in columns 4, 6 and 8, the index is calculated. The base of the index is the awareness level, i.e., the percentage of the consumer base who is aware of the brand. (See step 352). In column 9 of Fig. 30g, step 353 displays the projected brand share percentages (data from step 104) for reference.

Step 353 gives an overview of the advertising objectives in a chart as shown in Fig. 18h. After listing the geographic units, step 353 displays the consumer base in column 2 as determined in step 54. In columns 3, 4, 5 and 6, the following four indicators are entered: awareness, acceptance, preference and purchase (calculated) levels. In columns 7 and 8, the brand's sales objectives and

104(future). This is the last opportunity, when the user can revise the advertising objectives.

Step 354 analyzes the relationship between brand sales development and media expenditures in a chart as shown in Fig. 18i. Then, based on the correlation, Fig. 18i projects the necessary media
 5 spending that is needed to meet brand sales targets. For this analysis, the multiple regression statistical model 52 (see description there) is used which was also used for Forecast II and developed in step.

In the chart in Fig. 18i, the geographic unit and brand can be selected by hitting the appropriate keys. In the first row, the past media budget of the brand is entered from step 350. In the next line, the brand sales are entered from step 100 (past) and step 104 (future). In the next rows, the
 10 marketing planning process 10 suggests several influencing factors and enters the following data: awareness, acceptance, preference and purchase levels (data transferred from step 352 for the past, step 353 for the future), brand share (data from step 100 for the past, step 104 for the future) and total media spending (all brands - data from step 350). The user may enter any number of additional variables or may exclude any or all of the suggested variables from the calculation by hitting the
 15 appropriate keys.

Step 356 develops the media plan in a chart as shown in Fig. 18j. As a starting point for the media plan development, the user records in the 'Conclusions' the advertising message that the media plan has to convey to the target audience. This message was developed in step 26 and finalized in step 210. The effectiveness of the developed media plan depends on (a) how many target customers can be
 20 reached by using a particular medium (advertising reach), (b) who are those people (target consumers), (c) how many times the target audience will actually see, hear or read the advertising (number of contacts). The success of the media plan will depend on to what extent it will attain the required awareness and purchase levels. The media plan is developed on a geographic unit basis and usually comprises several campaigns during the year. For every campaign, the user needs to fill in a
 25 chart as shown in Fig. 18j. The geographic unit and year can be selected by hitting the appropriate keys, and then the user enters the campaign number (the number of campaigns to be entered is unlimited.)

In Fig. 18j, first the type of medium is selected and then the actual vehicle within the type of medium is set. For example, the type of medium is magazines, and the actual medium to be used is
 30 *Good Housekeeping*. The following factors will influencing the media mix selection: (a) the media effectiveness: i.e., which media can convey our message the most effectively depends on the message (how easy or complicated it is to understand?) and on the product (cosmetics are usually advertised in women's magazines); (b) the type of consumers reached, e.g., when the user follows a segmentation strategy, he or she will select the media which reaches the target group in the most effective way, and
 35 configure the reach of the media mix to be wide enough to realize sales objectives; (c) competitive media usage which in turn depends on the market situation, i.e., if the user is the market leader, then the user should probably spend more in each medium than any of the brand's competitors. If the user

she wants to take and then spend most of its money in the media not used by the targeted brand, while another option is to outspend the brand in its major medium; (d) cost effectiveness of the media is also an important factor and is usually expressed either by the "cost-per-thousand criterion" (the cost per thousand target consumer reached) or the "sales-per-\$unit-spent" index (See description below).

In the next line of Fig. 18j, the user enters the 'Timing' of the campaign. This can be one period, several periods or throughout the entire year. Then the target segment that will be reached by the particular vehicle. When the cursor is on the target segment line, step 356 lists the selected target segments (selection in step 120) and the user selects the segment that will be the target audience of the campaign. The percentages in the chart are based on the size of the target audience which is entered in the next column from step 66. In the next four lines, the following goals of the campaign are entered:

(1) Gross Rating Points (media/advertising reach) indicate the percentage of the target audience who have the opportunity to see, hear or read the advertising placed in the medium. (2) "Number of contacts" is the number of opportunity the target audience has to actually see, hear or read the user's advertising. (Other terms like frequency or exposure may mean the same concept.) (3) Medium index determines the number of insertions (placement of the ad in the magazine, or playing the commercial on tv) needed to attain the required contacts (or frequency goals). (4) Insertions mean the number of insertions (frequency of advertising) needed to attain the predetermined contact goals.

In line 5 of Fig. 18j, step 356 enters the placement costs, i.e., the cost of one insertion in the medium and calculates the campaign budget by multiplying the number of insertions with the placement costs. Lines 7, 8, and 9 display the following goals of the campaign: (1) "Awareness Level" goal among the target audience at the end of the campaign (in percentage and in numbers); (2) the "Purchase Level" achieved by the campaign, i.e., the percentage of the target audience that actually will buy the brand (in percentage and in numbers); (3) the "Purchase Frequency" of the target audience during a year; and finally (4) step 356 calculates the projected sales as a result of the campaign by multiplying the number of purchasers with the purchase frequency.

In a chart as shown in Fig. 18k, step 356 gives an overview of the individual campaigns in the form of a media plan. In column 1, step 356 lists the names of each vehicle which is used in the campaigns. Column 2 displays the campaign coverage, i.e., the number of people who were reached by the campaign based on the GRP calculation in Fig. 18j. In the last line, step 356 calculates the total coverage, i.e., the total number of people reached by all the campaigns which equals the sum of all people reached reduced by the duplication percentage which is entered in the last line. The duplication percentage indicates the overlap of consumers reached among the media used in the plan. High duplication percentage reduces the number of consumers actually contacted but in turn it increases the frequency of exposure to the advertising, i.e., the awareness level. When the user sets awareness objectives per medium, the duplication effect must be taken into consideration.

compare the cost of the various media per thousand consumers reached. The index is based on the price of one placement in accordance with the following formula:

$$\text{Cost per Thousand} = (\text{Total campaign budget} / \text{Total number of people reached}) \times 1000$$

5 In column 4, step 356 displays the awareness level goals for each campaign from Fig. 18j, and in column 5, step 356 displays the absolute number of consumers who, hopefully, will be aware of the brand at the end of the campaign. In the "Total" line, step 356 calculates the total number of consumers who will be aware of the brand at the end of the year by adding up the numbers in the awareness column and reducing it by the duplication percentage. In column 6 of Fig. 18k, step 356
10 displays the projected sales as a result of the campaigns (the total sum of projected sales reduced by duplications), and in column 7, step 356 calculates the budget of each campaign. In column 8, the second advertising index in terms of the sales/\$10,000 is calculated. This indicator reveals the projected sales per \$ 10,000 advertising expenditure. It can be used to compare the projected cost-effectiveness of the various media. The "Total" "Sales/\$10,000" indicator is calculated by dividing the
15 total sales potential by the total budget and by multiplying it by 10,000. The index thus takes into consideration duplications.

Cells 9, 10, 11 and 12 in the last two lines of Fig. 18k serve as a check on the strategy. Step 356 displays the sales objectives set for the year (step 104) with the sales projections of the campaigns, and in cell 10, step 356 calculates the difference in absolute numbers and in percentages.
20 This number serves only as a benchmark. Apart from advertising, there are several other factors which influence the sales, so that the user cannot state that the brand's actual sales will equal the sales potential calculated in this chart; it may be more or less. The aim of this calculation is only to provide the user with a better insight into the advertising expenditure.

Finally, step 356 summarizes the media plan in a chart as shown in Fig. 18l. The chart is
25 similar to the one in Fig. 18k, with the only difference being that here, step 356 summarizes the media vehicles per type of medium revealing the media budget per type of medium for the next year, i.e., the future data that is shown in Fig. 18a (see step 350). Developing a media plan with set advertising goals is the preferred way the marketing planning process 10 recommends to establish the size of the advertising budget.

30 Step 358 calculates the total advertising budget in a chart as shown in Fig. 18m. If none of the usual methods of media budget determination is used, then the user may use this chart for allocating a fix sum among the various geographic units according to their importance in the marketing strategy. The year for which the advertising budget is to be established can be selected. It is usually the first year of the planning period as determined in the set up. In the first column of Fig. 18m, step 358 lists
35 the geographic units, where the highest level is also considered as one geographic unit since there are campaigns which will cover the entire territory. In column 2, the share of each geographic units is calculated in the brand sales so as to reveal its importance in the marketing strategy.

year (data from step 350), then enters the amount of other advertising expenses and finally calculates the total advertising spending in column 5 by adding up the two. In columns 6, 7 and 8, the same data is shown for the selected year. Step 358 enters the projected media spending depending on the method selected. Step 358 automatically enters data generated in step 356. The user can change the source of data by selecting another method of media spending determination. After hitting the appropriate key, the user selects the method from the displayed list by putting the cursor on the selected one. Method I enters data generated in step 350, Method II in step 354, Method III in step 356, and Method IV provides the possibility for entering the data here, in step 358. "Other" advertising expenses which are expenses that we pay the advertising agency for producing the commercial or advertisement and their fee for handling our account which is usually calculated as a percentage of media expense, are entered here. In column 9 of Fig. 18m, step 358 calculates the percentage of each geographic unit that it represents in the total advertising budget. A comparison between the first and last percentage column aids the user to check on the correctness of the advertising strategy.

Step 358 gives three overviews in a chart as shown in Fig. 18n. In the first overview, step 358 lists the media in column 1, and displays the brand's media spending over the years in one geographic unit in column 2, and then calculates the yearly growth rate in one geographic unit in column 3. In the second overview, a medium is selected, and step 358 displays all the geographic units in column 1, and then in column 2, the media spending in the selected medium over the years, and the yearly growth rate in column 3. In the third overview, both the geographic unit and the medium can be selected, and step 358 displays all the brand names in column 1, and then the media spending in the selected geographic unit in the selected medium is shown in column 2, together with the yearly growth rate in column 3.

Step 360 gives an overview of the advertising strategy in a chart as shown in Fig. 18o. In columns 2 and 3, step 360 displays the projected brand sales per geographic unit (in units or in dollars) and the brand share percentages (data transferred from step 104). In column 4, step 360 displays the total advertising budget from step 360 before calculating the sales/\$10,000 index by dividing total sales by the total advertising budget and multiplying it by 10,000. In the last column of Fig. 18o, the user identifies the major media that is used in the particular geographic unit.

Step 360 displays a second overview in a chart as shown in Fig. 18p. In this overview, step 360 first ranks the geographic units according to the efficiency index (sales per \$10,000), before displaying the brand share percentage (from step 104) in column 3 and the major media used from Fig. 18o in column 4. The sales per \$10,000 indicator is different from the one calculated in step 356, because it refers to the total sales objectives of the brand that were developed in step 104 and not only to the sales levels projected in the media plan in step 356.

Step 360 compares the advertising strategies of the various brands in another overview that is displayed in a chart as shown in Fig. 18r. In column 1 of Fig. 18r, the brands are listed as defined in

from step 104, before displaying the advertising budget from step 358. In column 5, step 360 calculates the sales / \$10,000 ratio, and finally repeats the major medium used per brand per geographic unit from step 358.

5 Step 362 monitors media spending per brand per medium in a chart as shown in Fig. 18s. Step 362 displays the media in column 1 that is used by any brand, and then enters in column 2 the projected media spending of the total market per medium (data transferred from step 358 for our brand, and step 350 for other brands). In column 3, the user enters the actual media spending once the data becomes available. In the next two columns of Fig. 18s, step 363 calculates the difference
10 between the projected and actual spending first in absolute numbers then in percentages. The next group of columns, columns 6, 7, 8 and 9 of Fig. 18s, display the same data for the selected brand. The user needs to pay special attention to the development of the absolute level of media spending and to the development of spending levels in each medium and in each geographic unit. Step 362 rearranges the data in Fig. 18s and monitors spending development per geographic unit in a similar chart with the
15 only difference being that, here, the year/period and the medium is selected, and the geographic units are listed in the first column. Step 362 rearranges the data in another chart similar in structure to Fig. 18s but here the geographic unit, year/period and medium are selected, and the brands are listed in the first column. Note that media expenditures per brand (data from step 350) are tracked, but total advertising expenditure (data in step 358) are not because only that data is widely available.

20 Step 364 evaluates the results of the advertising campaigns in a chart as shown in Fig. 18t. In column 1, step 364 enters the names of the vehicles which were used in the media plan (developed in step 356), and then it displays the plan, which includes sales (step 356), awareness, acceptance, preference and purchase level objectives (data developed in step 353). The user enters the actual numbers once they become available.

25 Step 364 rearranges the data of Fig. 18t in three additional charts with similar structures where only column 1 is different. In the first overview chart, step 364 groups the numbers per advertising vehicle according to type of medium and displays the media in column 1, then the sales, awareness, acceptance, preference and purchase levels. In the second rearrangement, the chart's first column displays the geographic units, so that the user can see how the planned and actual numbers
30 have developed in one medium in all geographic units. In the third overview chart, step 364 rearranges the axes and shows how and to what extent the objectives were realized for one geographic unit in all media.

Finally, step 364 gives a yearly overview of the development of advertising goals in a chart as shown in Fig. 18u. Step 364 displays the yearly planned and actual numbers per campaign goal, sales
35 (data from step 356), awareness, acceptance, preference and purchase level (data from step 353) in the selected geographic unit. The actual number were entered in step 364.

determining the advertising objectives in steps 352 and 353; (2) developing the advertising message in step 356; (3) selecting the media mix in step 356; and (4) establishing the advertising budget in step 358. Steps 360 to 364 give several overview of the campaign goals so as to reveal inconsistencies if any and aid the user in tracking the results of the campaigns.

In step 34, the development of the promotion strategy is further explained in steps 380 to 388 with respect to Figure 10.

Step 380 starts with establishing which types of promotion are currently used for promoting the product and how much the major brands spend per type in a chart as shown in Fig. 19a. The task of step 380 is to analyze the following three major criteria for developing a promotional strategy: the amount spent on promotion, the types of promotion used, and the relationship between the sizes of the advertising and the promotional budgets.

In Fig. 19a, the geographic unit and the year can be selected by hitting the appropriate keys. Here the highest level of geographic unit is treated as an individual unit because there are promotional campaigns which cover the entire territory. The total promotional spending is thus the sum of promotional spending in all geographic units including the highest level. Step 380 lists "Promotion Type I" in column 1. The user renames the lines by entering the names of the actual types used and enters additional ones if necessary. Step 380 enters the names of the major brands in the column headings as defined in step 100 including the total market. Once the amount spent per type of promotion by each brand is entered, step 380 calculates the share of each type in the total promotional spending of each brand (percentage vertically).

Below the "Total" line, step 380 calculates the brand's share of promotional expenditures (SOP) which is a similar concept to the Share of Voice percentage; in other words, it is the percentage of the promotional expenditure of a brand in the total promotional expenses of all brands.

In the next line, step 380 calculates the relationship between the promotional expense and the media expense of each brand by dividing the promotional expense by the media expense and multiplying it with 100. The total amount of media expense is displayed in the last line (data transferred from step 350).

Step 380 aids in analyzing the promotional patterns of the competing brands by rearranging the data entered in Fig. 19a in four subsequent charts. In a chart as shown in Fig. 19b, step 380 compares a brand's share of promotion and market share. After the geographic unit and the year were selected, step 380 lists the various brands according to the size of their promotional expenditures in column 1 and the actual amount spent in column 2. In columns 3 and 4 of Fig. 19b, step 380 displays S.O.P. and the brand share percentages of each brand. In column 5, step 380 displays the ranking number of the brand according to brand share. Theoretically, the brand share and the S.O.P. ranking of a brand should be the same, i.e., the brand with the highest brand share is "supposed" to spend the most on promotion. If there is a discrepancy, the user should look for an explanation (a) in the

instead of advertising, or (c) in the other elements of the marketing mix. An explanation must be found in order to really understand what is going on in the marketplace.

In a chart as shown in Fig. 19c, step 380 ranks the brands per type of promotion according to the amount spent. In a similar chart shown in Fig. 19d, step 380 changes the axis, and ranks all types of promotion per brand. Finally in a chart as shown in Fig. 19e, step 380 gives an overview of promotional spending of the brands in one type of promotion for all geographic units. The structure of the chart is identical with the one in Fig. 19a.

Step 382 displays an inventory of the types of promotion used for the product in a chart as shown in Fig. 19f. The geographic unit and year can be selected by hitting the appropriate keys. In column 1, step 382 lists all the types of promotion that were entered in step 380. In addition, the user may enter any additional types that might be used for promoting the product. This chart serves as a reference library. The user should consult it during the promotional strategy development process. In column 2, the user describes in detail how the promotional campaign is executed and what its objective is. The ultimate objective of each promotional campaign is to increase sales but some campaigns offer additional benefits like removing product resistance, improving brand image, etc. Columns 3 and 4 show the two indicators of a promotional campaign: (a) the effectiveness ratio, and (b) the cost efficiency indicator.

The promotion effectiveness ratio equals the percentage of the size of the campaign that results in sales, e.g., in case of coupon distribution, the percentage of people who will redeem the coupon by buying the product. The cost efficiency ratio expresses the actual realized sales per a dollar unit of the promotional expense attributable to the campaign (# sold/\$ 10,000). In column 5 of Fig. 19f, step 358 indicates which brand is using the particular promotion the most.

Step 384 develops the actual promotional strategy in a chart as shown in Fig. 19g. This is an important chart because it contains the conclusions. It works as a word processing document. In the column headings, the campaign numbers are entered. In the first line of Fig. 19g, the objective of the campaign is entered. The objective will depend on the market situation, on the strength and weakness of the brand, the share of which the users wants to take, and on the marketing strategy. When developing a promotional strategy, the user starts with making a list of the marketing problems that need to be solved. Then the user selects those problems which can be best solved by a promotional campaign. For example, these problems include the need to move inventory in X types of stores, the need to increase product acceptance from 10% to 25%, the need to increase distribution shares in Y type of outlets, or the need to open up X number of new outlets.

The next item is the target of the campaign. The target can be the consumer, the trade, the sales force, etc. The success of a promotional campaign correlates directly with the strength of sales force support. The sales force thus should always be a part of the campaign. In the same way, even

buy them.

Based on the objective and the target of the campaign in step 384, the user selects the right type of promotion after having consulted the promotion inventory in step 382.

5 After the type of promotion is selected, step 384 determines the size of the campaign. "Size" is the number of coupons the user distributes, or the number of dealers where displays are installed. The type of promotion and the size of the campaign determines the budget, which is entered in line 5. The total budget equals the sum of the individual campaigns that the user decides are necessary to meet the brand's promotional objectives.

10 In line 6 of Fig. 19g, the timing of the campaign is entered. Timing of promotional campaigns should match other marketing strategies, e.g., the introduction of a new product, the developing of new distribution channels, and supplementing advertising activities. The user will also record an explanation for the type of campaigns in the line "Rationale".

15 The last three lines of Fig. 19g concern the results of the strategy. First, the user enters the sales targets for each campaign, and then in the next line the result of the campaign after its execution. It is an interesting exercise to develop two different campaigns for similar objectives in order to compare their efficiencies. Finally, in the last line, step 384 provides a space for the user to enter any comments deemed necessary.

20 Step 386 gives an overview of the promotion strategy for each geographic unit in a chart as shown in Fig. 19h. Step 386 lists the geographic units in column 1 and displays the promotional budget (the sum of individual campaigns developed in step 386) in column 2. Next in column 3, step 386 calculates the share of each geographic unit in the total promotional budget (vertical percentage). In column 4, step 386 calculates the share of the promotional budget of the advertising budget (percentage across). The actual size of the advertising budget is displayed in column 5 (data transferred from step 358). Step 386 calculates the share of each geographic unit in the total advertising budget (percentage vertically) in column 6. A comparison of the two vertical percentage columns will reveal important information about the consistency of the communication strategy. In columns 7, 8 and 9 of Fig. 19h, the user enters an (x) in the geographic unit where the particular campaign will be run.

30 In a second chart as shown in Fig. 19i, step 386 gives an overview of the promotional campaigns in one geographic unit. In column 1, the types of promotions are listed that were selected in step 354. In columns 2 and 3, step 386 displays the size of the campaign and the dollar amount spent per 1,000, i.e., step 386 divides the size of the campaign by the total amount of the campaign and multiplies it by 1000. This indicator reveals, for example, the price of 1,000 samples that will be distributed. In columns 4 and 5, step 386 displays the sales targets per campaign and calculates the share of each campaign in the total sales (percentage vertically). In columns 6 and 7 of Fig. 19i, step 386 displays the budget of each campaign from step 384 and calculates the share of each campaign in

which should be similar. Finally, in column 8 of Fig. 19i, step 386 calculates the sales/ per \$10,000 indicator by dividing the sales targets by the budget and multiplying it by 10,000. This indicator indicates the projected sales per \$10,000 promotional expenditure. This indicator provides a basis for
5 comparing the cost efficiency of the various campaigns.

Step 388 measures the effectiveness of the promotional campaigns in a chart as shown in Fig. 19j. In column 1, the types of promotions are listed that were selected in step 354. In column 2, step 388 displays the size of the campaign. In columns 3 and 4, step 386 displays the sales targets per campaign and calculates the two indicators, i.e., the response rate and the cost efficiency coefficient.
10 The response rate is calculated by dividing sales by the size of the campaign and multiplying it by 100. The response rate percentage is the effectiveness ratio, i.e., it reveals what percentage of the size of the campaign resulted in sales. In column 5 of Fig. 19j, step 388 calculates the projected cost efficiency of each campaign by dividing sales by the budget of the campaign and multiplying it by \$10,000. This indicator reveals the sales targets per \$10,000 promotional expenditure. In columns 6, 7
15 and 8, the user enters the results of each campaign and step 388 calculates again the two indices. In column 9 of Fig. 19j, the campaign budget is displayed (data transferred from step 384).

In a final overview as shown in Fig. 19k, step 388 ranks the various types of promotion in the selected geographic unit and year according to their cost efficiency, i.e., the most efficient promotional campaign is the one where the brand sold most per \$10,000 spent.

20 In summary, step 34 identifies the types of promotion used for promoting the product and sets up an inventory of promotional campaigns for future reference. Then, step 34 develops the promotional strategy including the individual campaigns per geographic unit, provides several overview charts for reviewing the correctness of the strategy and finally, monitors the results of the campaigns.

25 Step 36 of Fig. 1b is the second step where the results of the marketing strategy is evaluated, i.e., did the user succeed in developing a marketing strategy that meets the predetermined sales and profit objectives. If yes, the user goes to step 40 and implements the plan. If not, then the user goes to step 38 which takes him or her back to step 14 and starts with developing new sales, market share and profit objectives. Then steps 24 to 36 are repeated.

30 In Fig. 11, a further aspect of this system 10 is shown. In particular, this system organizes the working platform of the user and gives marketing advise for solving the task to be carried out by each chart through the assignment of tasks to the function keys. The Function Keys were designed to be a marketing consultant to the user at each step of the planning process. The same functions are provided with each of the charts described above.

35 F1 (Step 400) is the help key. It explains not only how the chart on the screen works, but also the underlying marketing principles. First, the objective of the chart is defined. Second, the data is listed that the program enters automatically (because they were already entered in a previous step),

subcharts. Finally, there is detailed description of the task to be performed, i.e., what conclusions need to be drawn.

5 F2 (Step 402) switches the data in the chart between units and \$ values. Data is usually entered in units. Which variable is calculated and which is entered, e.g., the average price or the dollar value, is decided in Fig. 7 by step 250. This decision is valid for the entire program. Once the data is entered in the price section (Fig. 7), the system can calculate the values in a particular chart in dollar and display the numbers.

F3 (Step 404) lists the information needed to enter in the particular chart.

10 F4 (Step 406) lists the assumptions to be drawn from the chart, and provides the space where to record the assumptions. Step 406 works like a word processor. The user puts the cursor on the selected assumption and a wider screen opens up, where the user can type in his or her observations. Step 406 is vital for good planning because it enables the user to remember the thought process that was used when developing the strategy.

15 F5 (Step 408) lists the strategic options that are available to the user in the various market situations (this key varies with sections not with charts.) For example, under what circumstances will the user attempt to increase the overall market and under what circumstances will he/she try to increase his or her market share. The data in the chart reveals the brand's position. With the aid of this description, it will be easy to decide on the right strategy per geographic unit.

20 F6 (Step 410) lists the conclusions to be draw in each section and provides space to record the conclusions. It works similarly to step 406 as a word processor. Under F1 key, the system listed the conclusions to be drawn from each chart and gave advice how to go about it. The conclusions will be recorded under the F6 key which summarizes them by section (each element of the marketing mix).

25 F7 (Step 412) is the forecast key which plots the trend of the array of numbers on which the cursor is located according to the times series statistical formulae, plots the past development of the data entered, and projects them according to the statistical formula of linear, exponential, half logarithmic, parabolic, power function and hyperbolic calculations. By hitting F7 again, a small list of all the trend types is displayed, and the user can select the one that he or she wants to be entered in the chart.

30 F8 (Step 414) shows the flowchart of the section to which the chart belongs, revealing how the planner goes step by step from analysis to strategy development.

F9 (Step 416) gives chart explanations, and explains abbreviations to be found on the screen.

MARFIN: THE MARKETING CONSULTANT

400	402	404	406	408	410	412	414	416
Explains the marketing task,	unit/\$ switch	Information needed list	List of assumptions	List of strategic	List of conclusions	Forecast I	Section flowchart	Chart explanation

works								
F1	F2	F3	F4	F5	F6	F7	F8	F9

Fig. 11

209080-6680/001

1. A method of devising on a computer a marketing plan for a particular product/service provided by a given entity, said method comprising the steps of:

- (a) defining one or more variables that are used to carry out said method;
- 5 (b) creating a series of charts for implementing a process of analyzing said defined variables;
- (c) defining a product name, a time frame over which a process of analysis is carried out; and a geographic unit in which said product is marketed;
- (d) said process of analyzing including the steps of:
 - 10 1. analyzing the size of the market for the particular product and forecast the size of the market within said frame;
 2. identifying the major brands of said particular product within a given geographic unit and calculating the entire market for said particular product with said given geographic unit;
 - 15 3. determining the share of said entire market of said particular product marketed by the entity;
 4. setting goals as to the profit level of the particular product of said entity; and
 5. monitoring the current profit level of said particular product with said
 - 20 profit level goals.

2. The method of devising a marketing plan as claimed in claim 1, wherein if the current profit level is below said profit level goals, discontinuing the marketing of said particular product.

3. The method of devising a market plan as claimed in claim 1, wherein there is further included the step of developing a marketing strategy for said particular product.

25 4. The method of devising a market plan as claimed in claim 3, wherein said marketing strategy is a function of the following strategies: the development of said particular product, setting its price, determining its distribution, planning its advertising and determining its promotion strategy.

5. The method of devising a market plan as claimed in claim 4, wherein the current profit level of said particular product is compared with said profit level goals and, if less, adjusting

30 one or more of said strategies.

(19) World Intellectual Property Organization
International Bureau



(43) International Publication Date
15 March 2001 (15.03.2001)

PCT

(10) International Publication Number
WO 01/18730 A1

- (51) **International Patent Classification⁷:** G06F 17/60 (81) **Designated States (national):** AE, AG, AL, AM, AT, AU, AZ, BA, BB, BG, BR, BY, BZ, CA, CH, CN, CR, CU, CZ, DE, DK, DM, DZ, EE, ES, FI, GB, GD, GE, GH, GM, HR, HU, ID, IL, IN, IS, JP, KE, KG, KP, KR, KZ, LC, LK, LR, LS, LT, LU, LV, MA, MD, MG, MK, MN, MW, MX, MZ, NO, NZ, PL, PT, RO, RU, SD, SE, SG, SI, SK, SL, TJ, TM, TR, TT, TZ, UA, UG, US, UZ, VN, YU, ZA, ZW.

(21) **International Application Number:** PCT/US00/24780

(22) **International Filing Date:** 8 September 2000 (08.09.2000)

(25) **Filing Language:** English

(26) **Publication Language:** English

(30) **Priority Data:** 60/152,726 8 September 1999 (08.09.1999) US

(71) **Applicant and**

(72) **Inventor:** BOSZE, Suzanne, M. [US/US]; 19134 Fisher Island Drive, Fisher Island, FL 33109 (US).

(74) **Agents:** GABLE, R., Lewis et al.; Cowan, Liebowitz & Latman, P.C., 35th floor, 1133 Avenue of the Americas, New York, NY 10036 (US).

(84) **Designated States (regional):** ARIPO patent (GH, GM, KE, LS, MW, MZ, SD, SL, SZ, TZ, UG, ZW), Eurasian patent (AM, AZ, BY, KG, KZ, MD, RU, TJ, TM), European patent (AT, BE, CH, CY, DE, DK, ES, FI, FR, GB, GR, IE, IT, LU, MC, NL, PT, SE), OAPI patent (BF, BJ, CF, CG, CI, CM, GA, GN, GW, ML, MR, NE, SN, TD, TG).

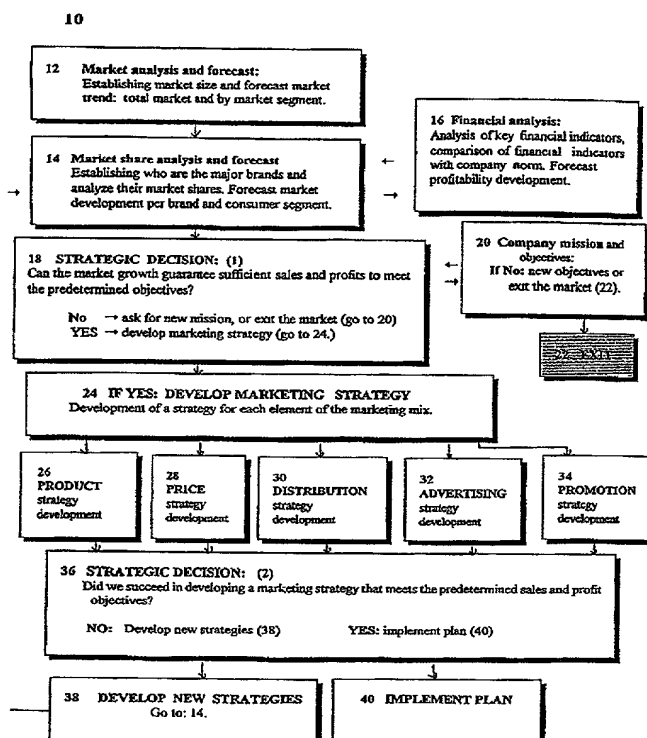
Published:
— With international search report.

For two-letter codes and other abbreviations, refer to the "Guidance Notes on Codes and Abbreviations" appearing at the beginning of each regular issue of the PCT Gazette.

Published:
— *With international search report.*

For two-letter codes and other abbreviations, refer to the "Guidance Notes on Codes and Abbreviations" appearing at the beginning of each regular issue of the PCT Gazette.

(54) Title: METHOD AND APPARATUS FOR INTERACTIVELY PREPARING MARKETING PLANS



(57) Abstract: A method is disclosed for devising on a computer a marketing plan for a particular product/service provided by a given entity. The method comprises the steps of defining one or more variables that are used to carry out the method, creating a series of charts for implementing a processing of analyzing the defined variables, and defining a product name, a time frame over which a process of analysis is carried out; and a geographic unit in which the product is marketed. The process of analysis (14) includes the steps of analyzing the size of the market for the particular product and forecasting the size of the market within the frame, identifying the major brands of the particular product within a given geographic unit and calculating the entire market for the particular product within the given geographic unit, determining the share of the entire market of the particular product marketed by the entity, setting goals as to the profit level of the particular product of the entity and monitoring the current profit level of the particular product with the profit level goals (28).

[illegible]

WO 01/18730 A1

10

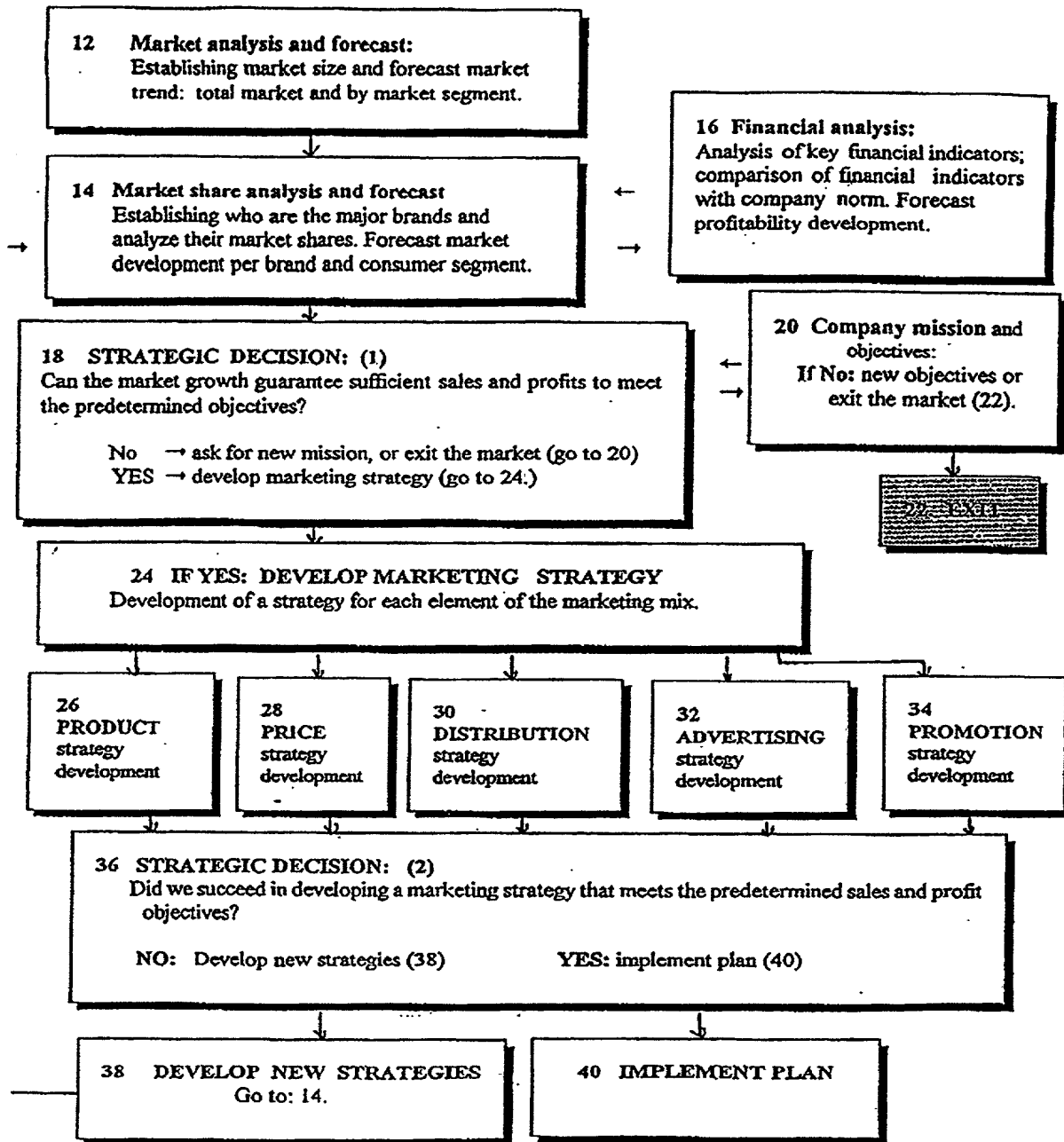


Fig. 1

12

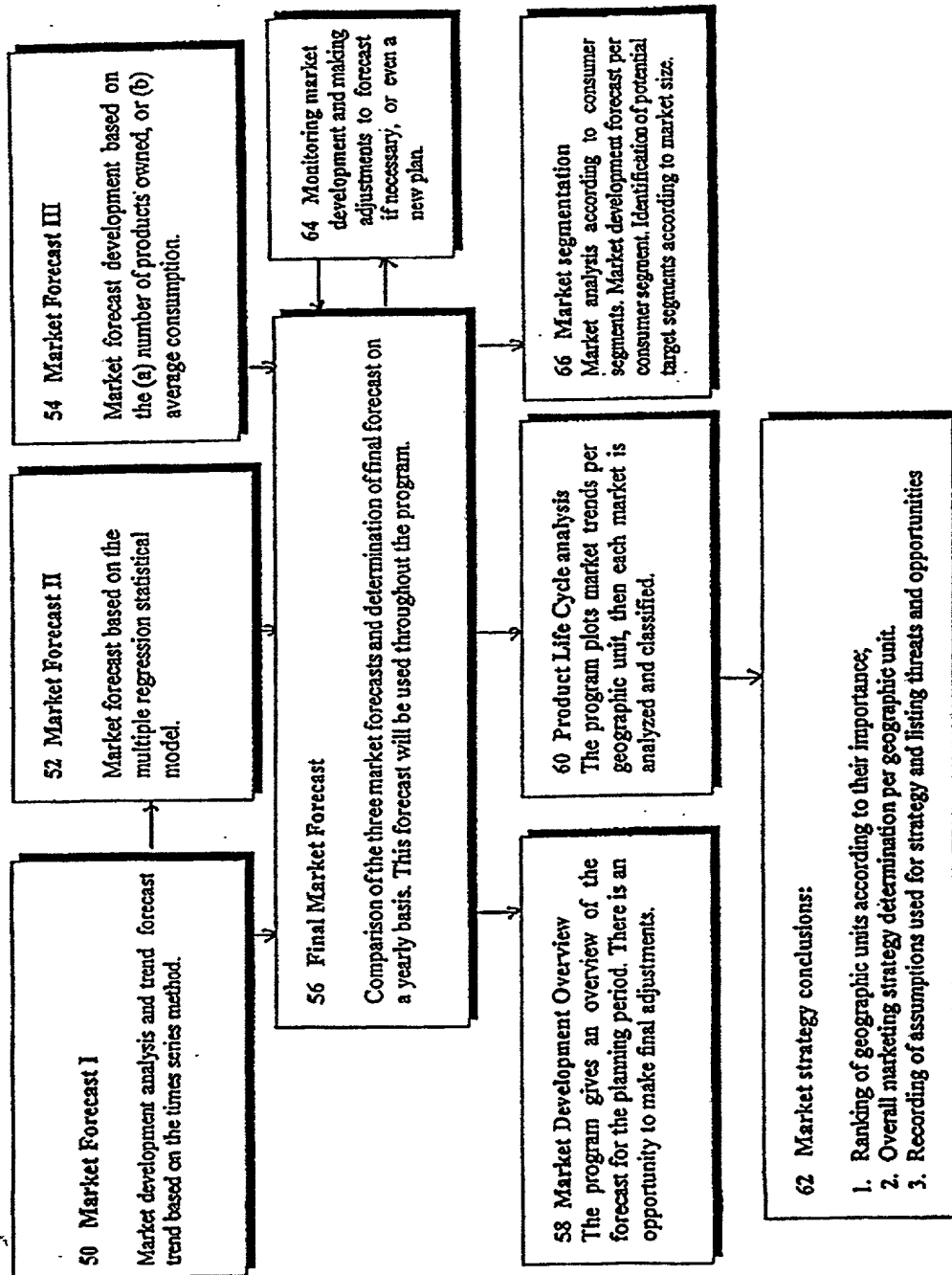


Fig. 2.

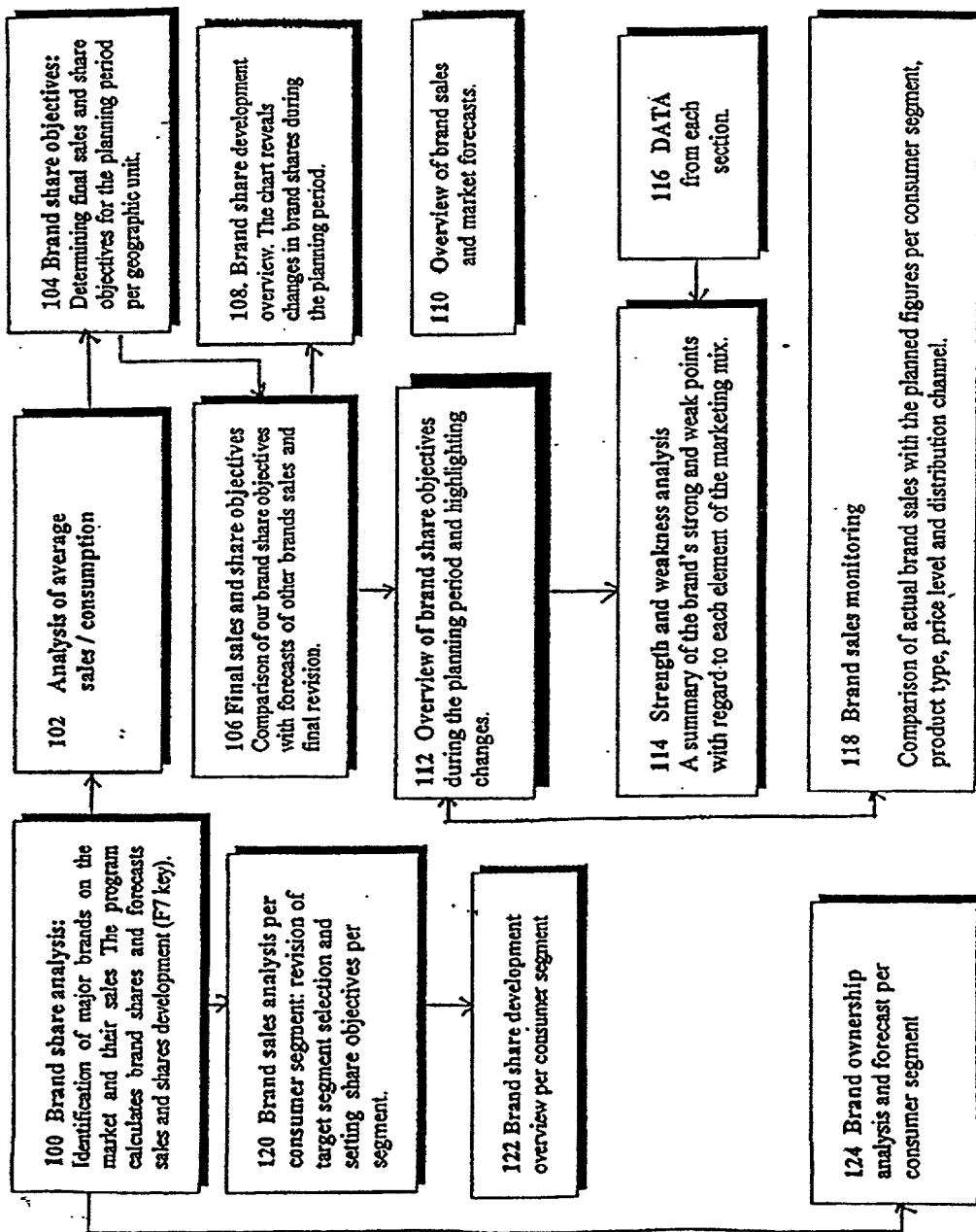


Fig. 3.

16

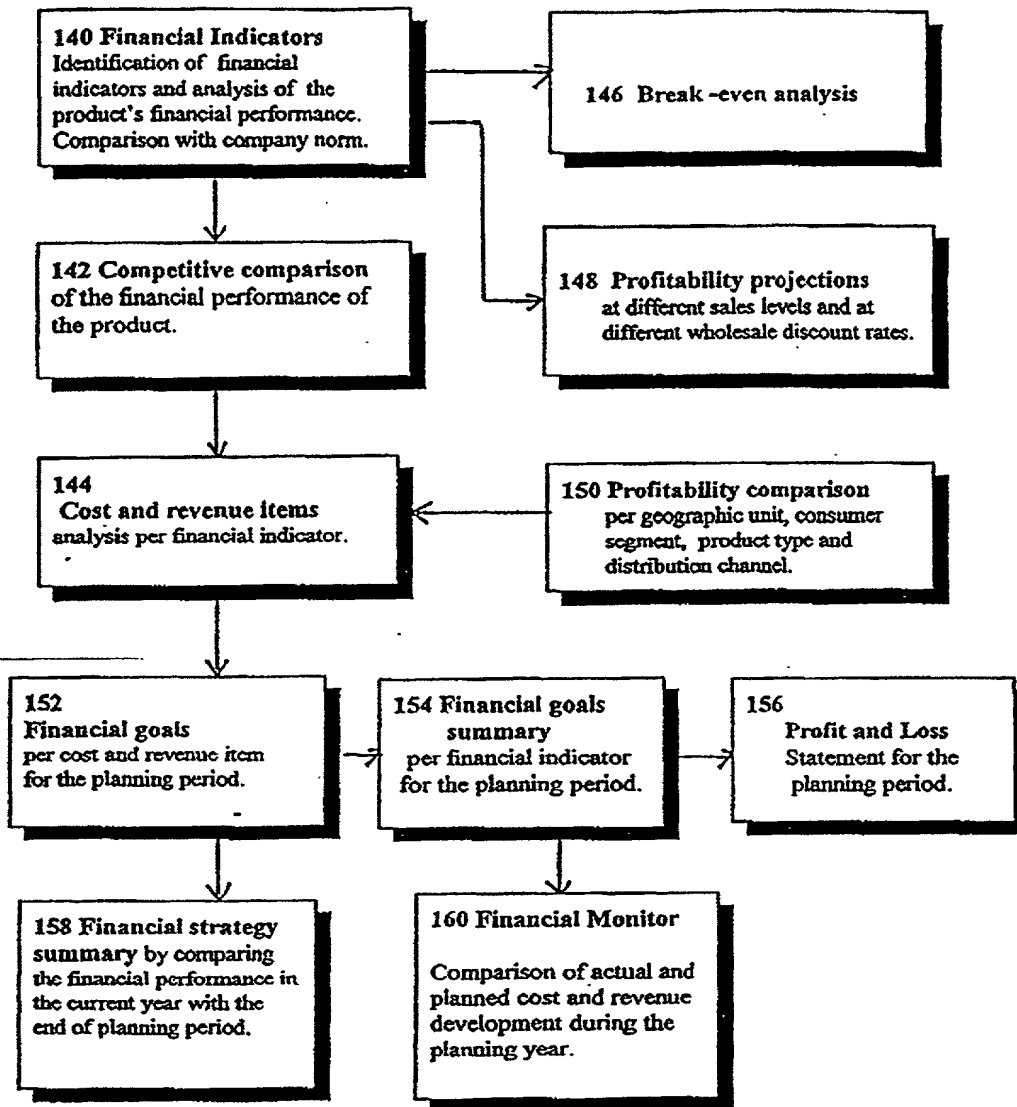


Fig. 4

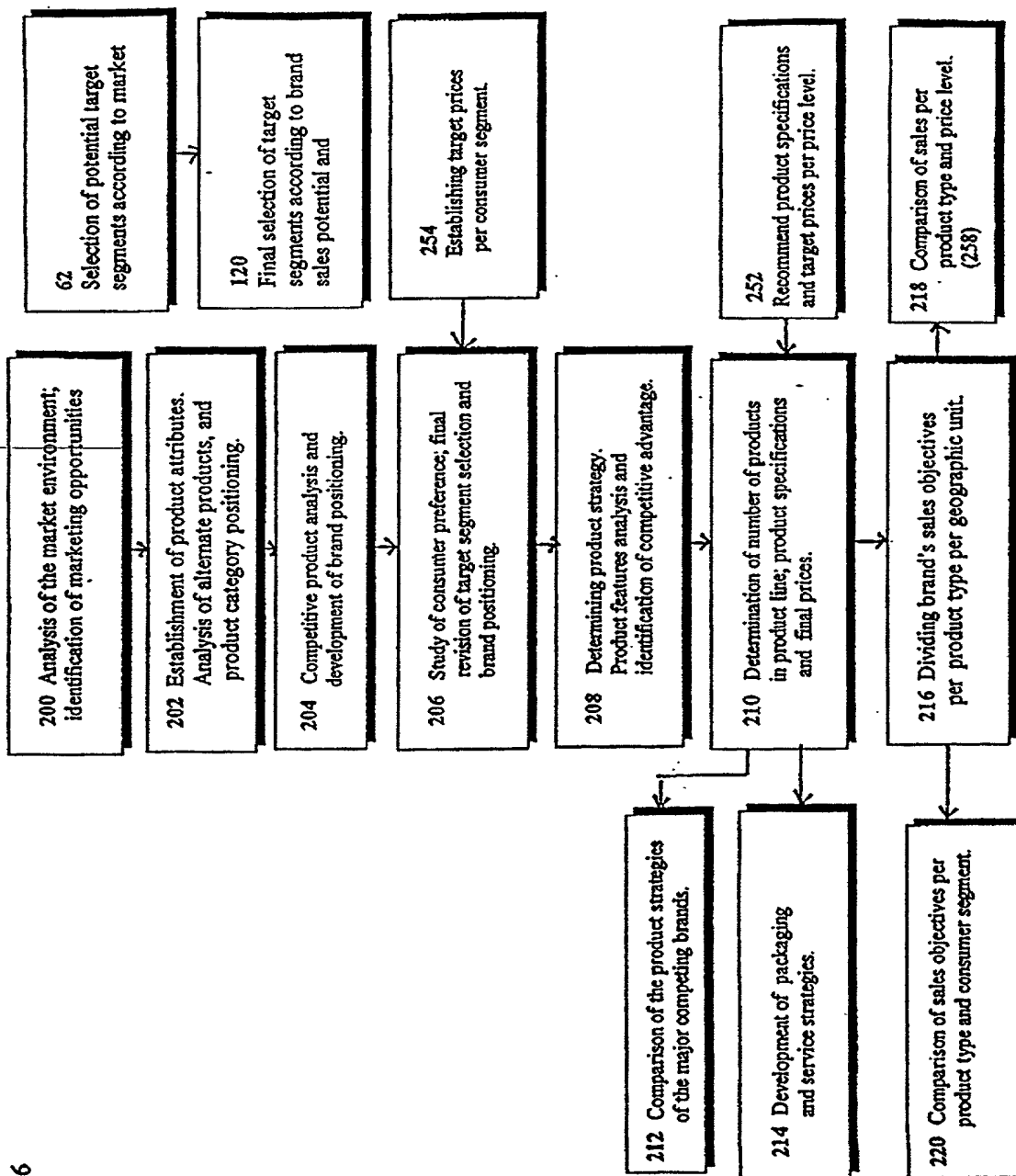


Fig. 5

26B

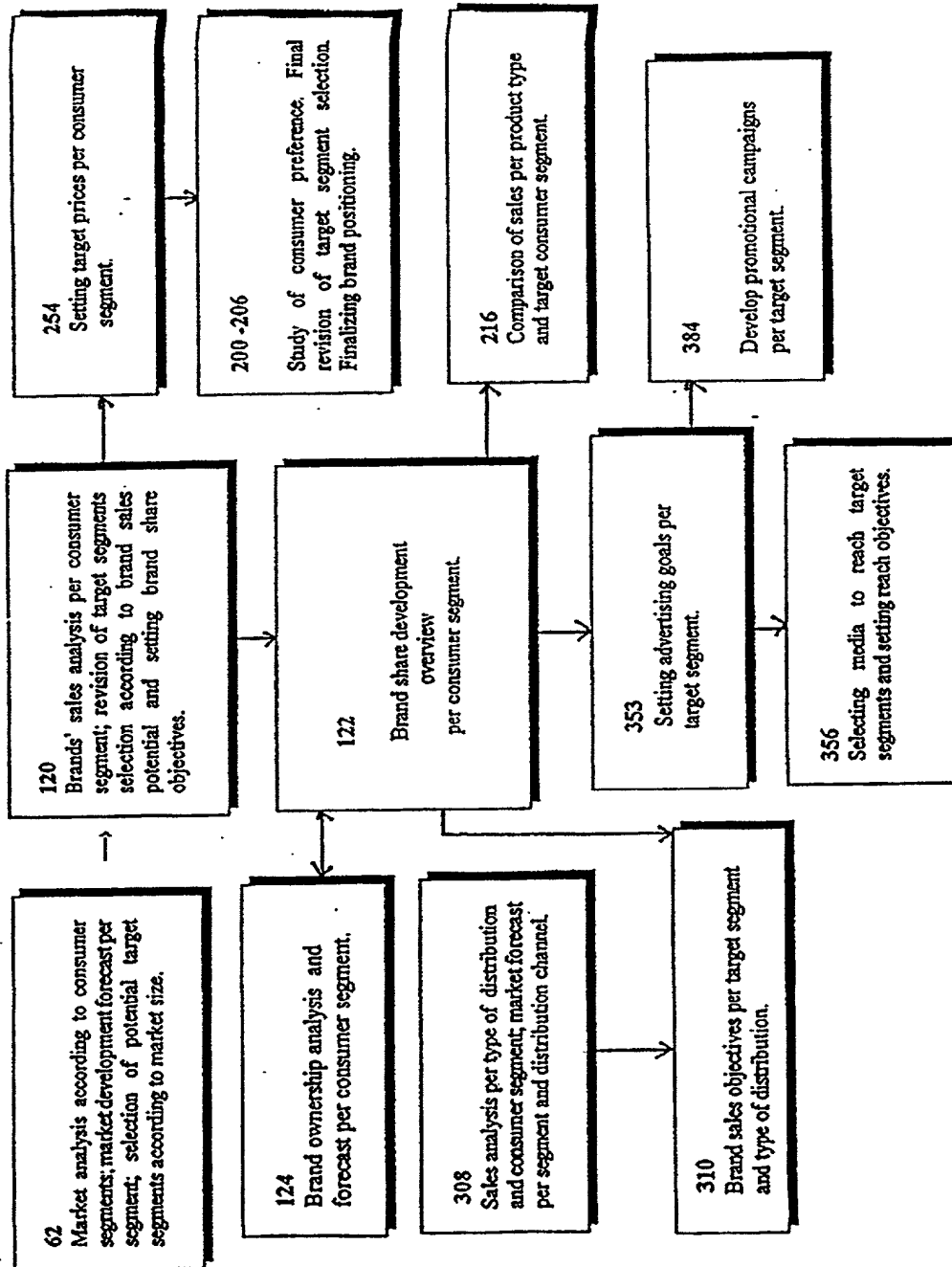


Fig. 6

28

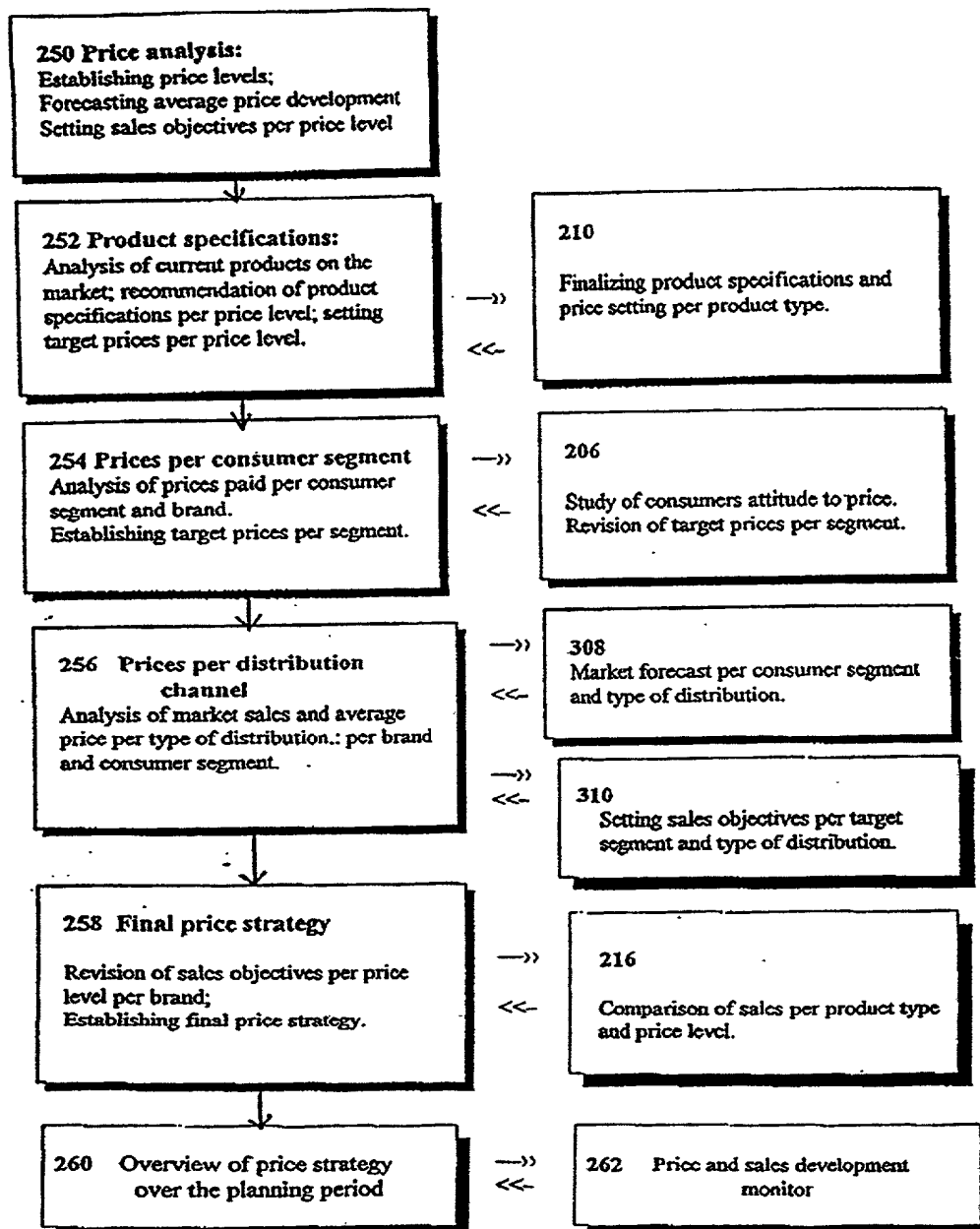


Fig. 7

30

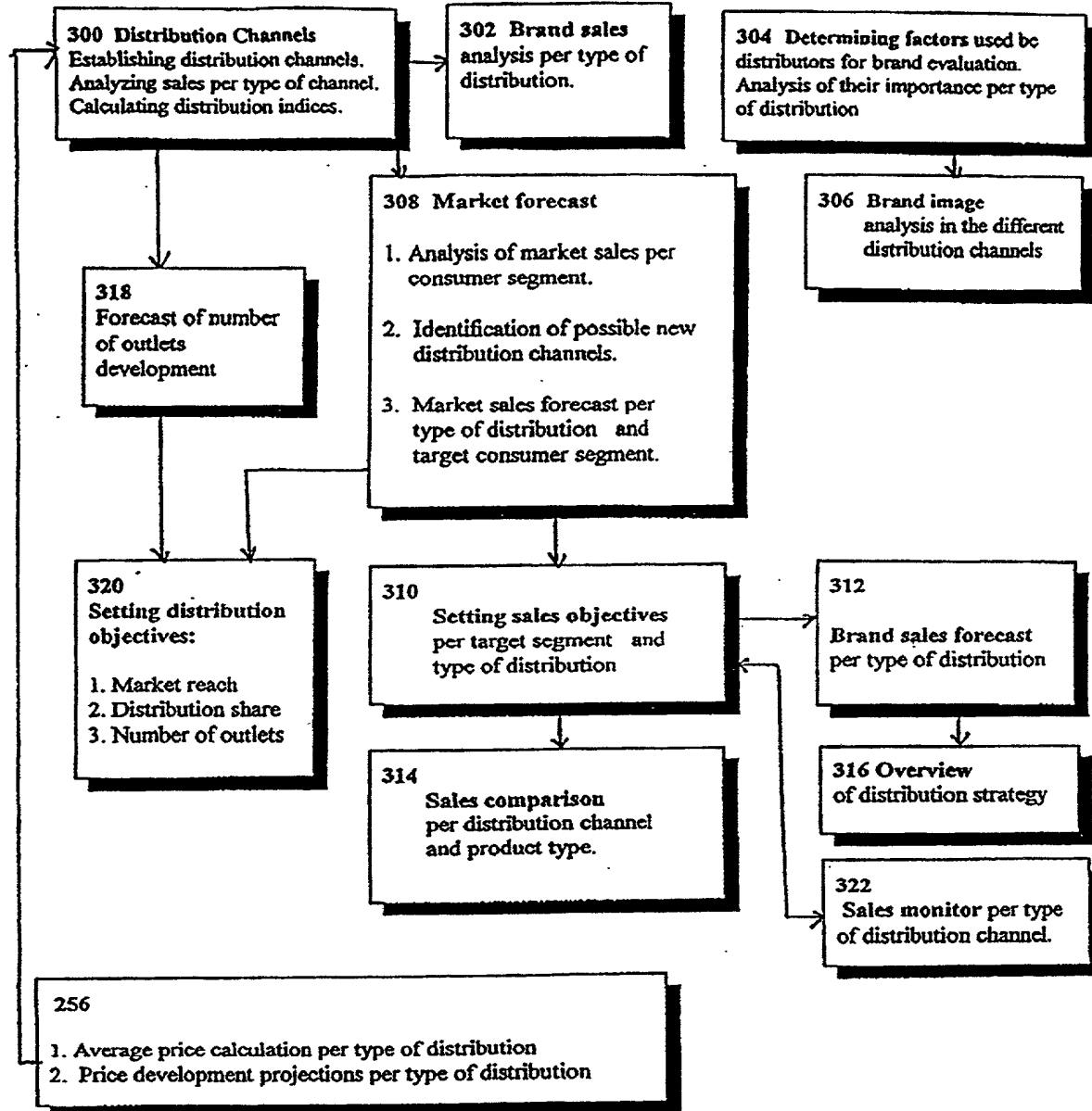


Fig. 8

Fig.1 Block 32

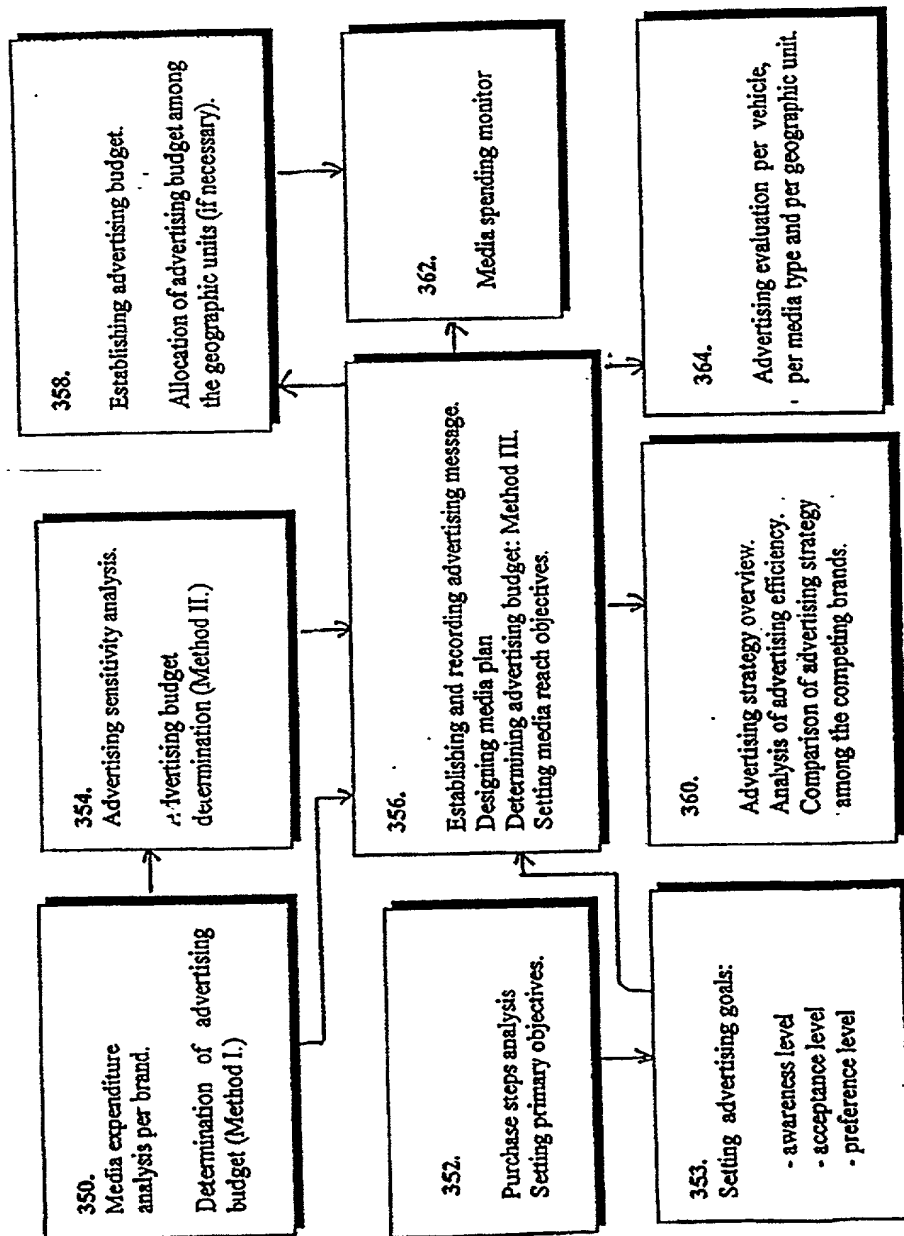


Fig. 9

Fig. 1 Block 34.

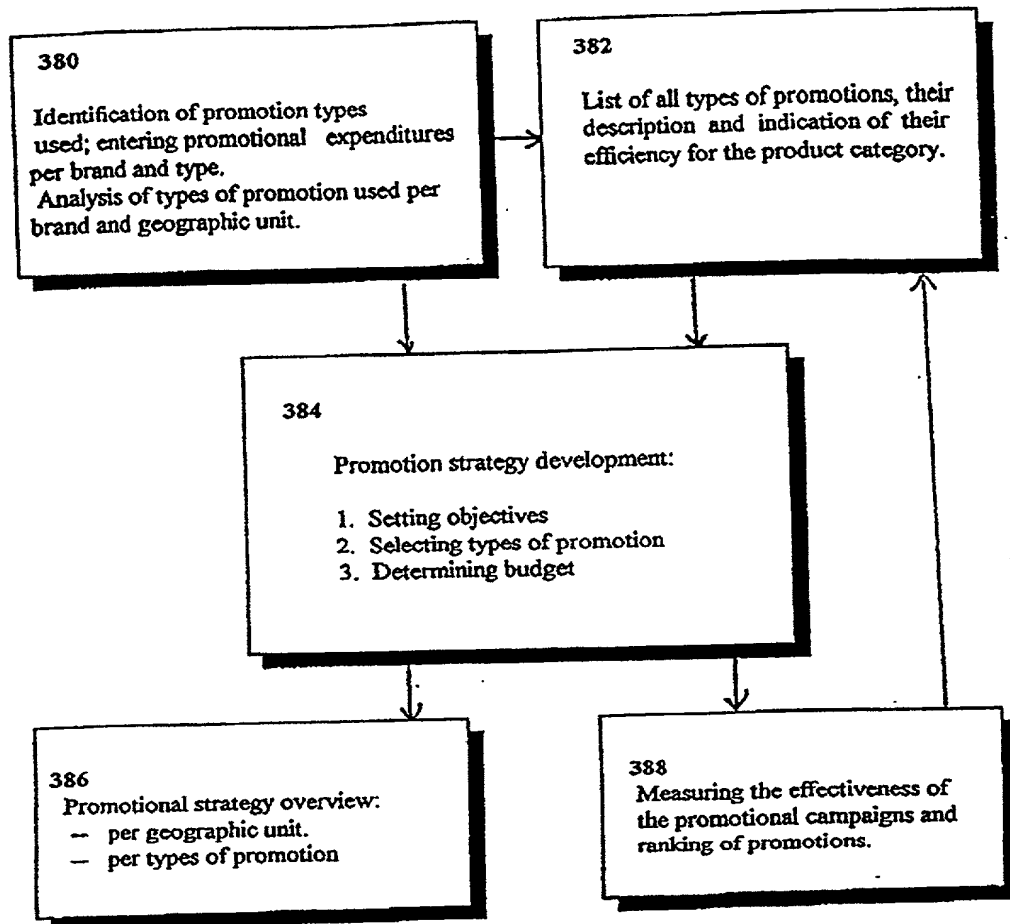


Fig. 10

MARFIN: THE MARKETING CONSULTANT²

400	Explains the marketing task, and how the chart works	402	unit/\$ switch	404	Information needed list	406	List of assumptions	408	List of strategic options	410	List of conclusions	412	Forecast I	414	Section flowchart	416	Chart explanation
F1		F2		F3		F4		F5		F6		F7		F8		F9	

(20)
Predesigned chart to perform a certain marketing task = the working platform of the planner

422	424	426
Ctrl M, Ctrl Pg up, Ctrl Pg down	Ctrl S	Ctrl G
Brings up a small menu with enables the planner to move around the charts by typing in the chart number.	Brings up the subchart menu belonging to the main chart. The subcharts rearrange the numbers entered in the main chart so as to reveal their marketing meaning.	Brings up the menu of the graphs belonging to the main chart. The graphs show trends and help design strategy.

430 Shift F1-F10 keys vary with charts. They have two main functions:
(a) Help change the variables in the main chart, (like F2 changes geographic units), or
(b) Help customize the chart

F16.11

Fig. 12a

MARKET DEVELOPMENT - FORECAST I

Geographic Units	Past Year		Past Year		Future Year		Future Year	
	Consumer Demand	Growth Rate %	Consumer Demand	Growth Rate %	Consumer Demand	Growth Rate %	Consumer Demand	Growth Rate %
	Col. 1	Col. 2	Col. 1	Col. 2	Col. 3	Col. 4	Col. 3	Col. 4
TOTAL Market								

Fig. 12b

GROWTH RATE COMPARISON

Geographic Units	Year			Year		
	Growth Rate Units %	Growth Rate Dollars %	Difference	Growth Rate Units %	Growth Rate Dollars %	Difference
	Col. 1	Col. 2	Col. 3			
TOTAL Market						

Fig. 12c

MARKET DEVELOPMENT - FORECAST II

Geog. Unit	(Units)						
	Year	Year	Year	Future Year	Future Year	Future Year	Future Year
Market Development	Col. 1	Col. 2					
Influencing Factors							
Factor I							
Factor II							

[illegible]

Fig. 12d

NUMBER OF PRODUCT OWNERS AND SATURATION DEGREES

Cons. Seg.

Geog. Units	Year			Year		
	Consumer Base (000)	Product Owners (000)	Saturation Degree %	Consumer Base (000)	Product Owners (000)	Saturation Degree %
	Col.1	Col.2	Col.3			
TOTAL Market						

Fig. 12e

AVERAGE CONSUMPTION

Cons. Seg.

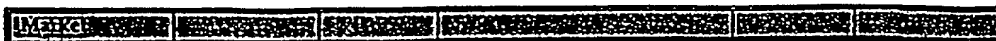
GEOG. UNITS	YEAR			YEAR		
	Consumer (000)	Average Consumption	Sales (000)	Consumer (000)	Average Consumption	Sales (000)
	Col.1	Col.2	Col.3			
TOTAL Market						

Fig. 12f

MARKET PENETRATION FORECAST

(000)

Geog. Units	Year			Year		
	Consumer Base (000)	Products Owned	Penetration Degree %	Consumer Base (000)	Products Owned	Penetration Degree %
	Col.1	Col.2	Col.3			
TOTAL						



10070893-030600

Fig. 14i
PRODUCT PROFITABILITY

Geog. Unit		Year					
FINANCIAL INDICATORS		Product Type I		Product Type II		Product Type III	
		\$ (000)	% of Sales	\$ (000)	% of Sales	\$ (000)	% of Sales
SALES			100		100		100
Cost of Goods	Col.1	Col.2	Col.3	Col.4	Col.5	Col.6	Col.7
REVENUE							
Revenue Adjustments							
NET REVENUE							
Marketing Expense							
Selling Expense							
Other Direct Expenses							
TOTAL DIRECT EXP.							
BRAND CONTRIBUTION							
BUSINESS INCOME							

w/a = without allocations

Fig. 14j
PROFITABILITY COMPARISON PER CONSUMER SEGMENT

Geog. Unit		Year					
FINANCIAL INDICATORS		Total		Segment I		Segment II	
		\$ (000)	% of Sales	\$ (000)	% of Sales	\$ (000)	% of Sales
SALES			100		100		100
Cost of Goods	Col.1	Col.2	Col.3	Col.4	Col.5	Col.6	Col.7
REVENUE							
Revenue Adjustments							
NET REVENUE							
Marketing Expense							
Selling Expense							
Other Direct Expenses							
TOTAL DIRECT EXP.							

BRAND CONTRIBUTION						
BUSINESS INCOME						

w/a = without allocations

Fig. 14k

PROFITABILITY COMPARISON PER DISTRIBUTION CHANNEL

Geog. Unit

Year

FINANCIAL INDICATORS	T o t a l		Channel I		Channel II	
	\$ (000)	% of Sales	\$ (000)	% of Sales	\$ (000)	% of Sales
SALES		100		100		100
Cost of Goods Col.1	Col.2	Col.3	Col.4	Col.5	Col.6	Col.7
REVENUE						
Revenue Adjustments						
NET REVENUE						
Marketing Expense						
Selling Expense						
Other Direct Expenses						
TOTAL DIRECT EXP.						
BRAND CONTRIBUTION						
BUSINESS INCOME						

w/a = without allocations

Fig. 14l
GOALS PER COST ITEM

Geog. Unit	Product Type:		(\$000)			
	CURRENT YEAR		YEAR		YEAR	
	\$ (000)	% of Sales	\$ (000)	% of Sales	\$ (000)	% of Sales
SALES		100		100		100
COST OF GOODS Col.1	Col.2	Col.3	Col.4	Col.5	Col.6	Col.7
REVENUE						
ADJUSTMENTS						
Adjustment I						
Adjustment II						
NET REVENUE						
MARKETING EXPENSE						
Advertising						
Promotion						
Market Research						
Other						
SELLING EXPENSE						
Sales Force						
Administration						
Other						
OTHER DIRECT EXP.						
Expense I						
Expense II						
Expense III						
INDIRECT EXPENSES						
Expense I						
Expense II						
ALLOCATIONS						
Allocation I						
BUSINESS INCOME						
HURDLE RATE						

Fig.14 m
GROWTH RATE PER COST/REVENUE ITEM

	0	1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	18	19	20	21	22	23	24	25	26	27	28	29	30	31	32	33	34	35	36	37	38	39	40	41	42	43	44	45	46	47	48	49	50	51	52	53	54	55	56	57	58	59	60	61	62	63	64	65	66	67	68	69	70	71	72	73	74	75	76	77	78	79	80	81	82	83	84	85	86	87	88	89	90	91	92	93	94	95	96	97	98	99
0	0	1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	18	19	20	21	22	23	24	25	26	27	28	29	30	31	32	33	34	35	36	37	38	39	40	41	42	43	44	45	46	47	48	49	50	51	52	53	54	55	56	57	58	59	60	61	62	63	64	65	66	67	68	69	70	71	72	73	74	75	76	77	78	79	80	81	82	83	84	85	86	87	88	89	90	91	92	93	94	95	96	97	98	99

Fig. 14n
GOALS PER KEY FINANCIAL INDICATOR

Geog. Unit			Product Type:			
FINANCIAL INDICATORS	CURRENT YEAR		YEAR		YEAR	
	\$ (000)	Growth Rate %	\$ (000)	Growth Rate %	\$ (000)	Growth Rate %
SALES Col.1	Col.2	Col.3	Col.4	Col.5		
Cost of Goods						
REVENUE						
Revenue Adjustments						
NET REVENUE						
Marketing Expense						
Selling Expense						
Other Direct Exp.						
TOTAL DIRECT EXP.						
BRAND CONTRIBUTION						
Indirect Expenses						
TOTAL EXPENSES Without Allocations						
PROFIT/A						
Allocations						
TOTAL EXPENSES						
BUSINESS INCOME						

Fig. 14o
GROWTH RATE ANALYSIS: Geographic units

Financial Indicator:					Product Type:			
Geog. Units	Current year		year		year		year	
	\$ (000)	Growth %	\$ (000)	Growth %	\$ (000)	Growth %	\$ (000)	Growth %
Col.1	Col.2	Col.3	Col.4	Col.5				
Total								

Fig. 14p

PROFIT AND LOSS STATEMENT

Geog. Unit

Product Type:

FINANCIAL INDICATORS	CURRENT YEAR		YEAR		YEAR	
	\$(000)	% of Sales	\$(000)	% of Sales	\$(000)	% of Sales
SALES		100		100		100
Cost of Goods Col.1	Col.2	Col.3	Col.4	Col.5		
NET REVENUE						
Marketing Expense						
Selling Expense						
Other Direct Exp.						
TOTAL DIRECT EXP.						
BRAND CONTRIBUTION						
Indirect Expense						
TOTAL EXPENSES Without Allocations						
Business Income b/allocations						
Allocations						
TOTAL EXPENSES						
BUSINESS INCOME						
% Change in R.O.S.						
% Change in Sales						
% Change in Br. Contr.						
% Change in B. Income						

b/allocations = before allocations

Br. Contr. = Brand Contribution

R.O.S = Return on Sales = (Business Income / Sales)*100

Fig. 14r
SUMMARY OF FINANCIAL STRATEGY

Geog. Unit

FINANCIAL INDICATORS	CURRENT YEAR		PREVIOUS YEAR		CHANGE		GROWTH RATE
	\$ (000)	% of Sales	\$ (000)	% of Sales	\$ (000)	% of Sales	
SALES		100		100		100	
Cost of Goods Col.1	Col.2	Col.3	Col.4	Col.5	Col.6	Col.7	Col.8
NET REVENUE							
Marketing Expense							
Selling Expense							
Other Direct Exp.							
TOTAL DIRECT EXP							
BRAND CONTRIBUTION							
Indirect Expense							
TOTAL EXPENSES Without Allocations							
EBI before Allocations							
Allocations							
TOTAL EXPENSES							
BUSINESS INCOME							

Fig. 14s
FINANCIAL MONITOR

Geog. Unit	YEAR/Period	Product Type:			Distr. Channel:		(\$000)		
Financial Indicators	Year-to-Date				Period:				
	Plan	Actual	Difference		Plan	Actual	Difference		
			#	%			#	%	
SALES	Col.1	Col.2	Col.3	Col.4	Col.5	Col.6	Col.7	Col.8	Col.9
Cost of Goods									
REVENUE									
Revenue Adjustments									
NET REVENUE									
Marketing Expense									
Selling Expense									
Other Direct Expenses									
Total Direct Exp.									
BRAND CONTRIBUTION									
BUSINESS INCOME									

Fig. 14v
MONITOR PER GEOGRAPHIC UNIT

Year/Period:	Financial Indicator:		Product Type:		Distr.Channel:		(\$000)	
Geographic Units	Year-to-Date:				Period:			
	Plan	Actual	Difference		Plan	Actual	Difference	
			#	%			#	%
Geog. Unit I Col.1	Col.2	Col.3	Col.4	Col.5	Col. 6	Col.7	Col.8	Col.9
Geog. Unit II								
Geog. Unit III								
Geog. Unit IV								
TOTAL								

Fig.15a

MARKET ENVIRONMENT ANALYSIS

Geog. Unit		Year				
SUBMARKETS	Consumer Base		Market		Market/Consumer r \$	SELECTION
	# (000)	%	\$ (000)	%		
1. Col.1	Col.2	Col.3	Col.4	Col.5	Col.6	Col.7
2.						
3.						
4.						
5.						
BASE						

X = The same product category Y = new product category Z = Competitive threat

Fig. 15b

RANKING OF SUBMARKETS

Geog. Unit		Year		Year	
NUMBER OF CONSUMERS		MARKET SIZE		SUBMARKET/CONSUMER	
SUBMARKETS	# 000	SUBMARKETS	\$(000)	SUBMARKETS	%
1. Col.1	Col.2	1. Col.3	Col.4	1. Col.5	Col.6
2.		2.		2.	
3.		3.		3.	
4.		4.		4.	
5.		5.		5.	

Also in units.

Fig.15c

DEVELOPMENT OF

Geog. Unit

Submarkets	Past Year		Past Year		Future Year		Future Year	
	#	Growth Rate %	#	Growth Rate %	#	Growth Rate %	#	Growth Rate %
Col.1	Col.2	Col.3						
TOTAL								

Fig. 15d

..... PER GEOGRAPHIC UNIT

Submarket

Geographic Units	Past Year		Past Year		Future Year		Future Year	
	#	Growth Rate %	#	Growth Rate %	#	Growth Rate %	#	Growth Rate %
Col.1	Col.2	Col.3						
TOTAL								

Fig. 15e

PRODUCT ANALYSIS

Geog. Unit	Year	Cons. Segment			Scale: 5-1		
		The Product	Alternative Product I	Alternative Product II	Better	Y/N	Rank
1. Consumer Need	Col.1	Col.2	Col.3	Col.4	Col.5	Col.6	Col.7
1.1 Attribute							
1.2 Attribute							
2. Consumer Need							
2.1 Attribute							
2.2 Attribute							
No. of Consumers (000)							
Market Size (000)							

Scale = 5 excellent 4-3-2 = acceptable 1 = not acceptable

Y/N = yes/no market opportunity = there is a market opportunity if there is no alt.

Product with a valuation of (5)

Fig. 15f.

RANKING OF PRODUCTS

Geog. Unit		Year	Cons. Segment			Scale: 1-5		
Product Attribute (1)			Product Attribute (2)			Product Attribute (3)		
Products	Y/N	Score	Products	Y/N	Score	Products	Y/N	Score
1. Col.1	Col.2	Col.3	1.			1.		
2.			2.			2.		
3.			3.			3.		
4.			4.			4.		

Fig. 15g

RANKING OF PRODUCT ATTRIBUTES

Geog. Unit	Year	Cons. Segment	Scale: 1-5					
The Product			Alternate Product I			Alternate Product II		
Attributes	Y/N	Score	Attributes	Y/N	Score	Attributes	Y/N	Score
1. Col.1	Col.2	Col.3	1.			1.		
2.			2.			2.		
3.			3.			3.		
4.			4.			4.		

Fig. 15h

COMPETITIVE ANALYSIS

Geog. Unit	Year	Cons. Segment	Scale: 5-1				
Product Attributes	Alternate Products	The Brand	Brand I	Better	Y/N	Rank	Competitive Advantage
Attribute (1) Col.1	Col.2	Col.3	Col.4	Col.5	Col.6	Col.7	Col.8
Attribute (2)							
Attribute (3)							
Attribute (4)							
Market Shares (%)							

Scale = 5 excellent 4-3-2 = acceptable 1 = not acceptable

Y/N = yes/no market opportunity = there is a market opportunity if there is no alt.

Product with a valuation of (5)

Fig. 15i

RANKING OF BRANDS

Geog. Unit	Year	Cons. Segment	Scale: 1-5					
Product Attribute (1)			Product Attribute (2)			Product Attribute (3)		
Brands	Y/N	Score	Brands	Y/N	Score	Brands	Y/N	Score
1. Col.1	Col.2	Col.3	1.			1.		
2.			2.			2.		
3.			3.			3.		
4.			4.			4.		

Fig. 15j

RANKING OF PRODUCT ATTRIBUTES

Geog. Unit			Year			Cons. Segment			Scale: 1-5		
The Brand			Brand I			Brand II					
Attributes	Y/N	Score	Attributes	Y/N	Score	Attributes	Y/N	Score			
1. Col.1	Col.2	Col.3	1.			1.					
2.			2.			2.					
3.			3.			3.					
4.			4.			4.					

Fig.k

CONSUMER PREFERENCE ANALYSIS

Geog. Unit			Year			Scale:1-5		
Consumer Base			Segment I			Segment II		
(000)	%		(000)	%		(000)	%	
Size of Segment Col.1	Col.2	100 Co. 3	Col.4	100 Col.5		100		100
Current Consumers								
Potential Consumers								
Product Attributes								
Price								
Target Segments								

Scale: (5) = very important (1)= not important at all

Fig.15 l

RANKING OF CONSUMER PREFERENCE

Geog. Unit	Year		Scale: 1-5		
Consumer Base	Score	Segment I	Score	Segment II	Score
1. Attribute		1.		1.	
2. Col.1	Col.2	2.		2.	
3.		3.		3.	
4.		4.		4.	
5.		5.		5.	

Fig. 15m

PRODUCT POSITIONING OVERVIEW

GEOGRAPHIC UNIT:

YEAR:

Brand Positioning

Segment Positioning

Combined

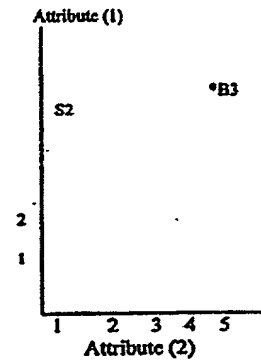
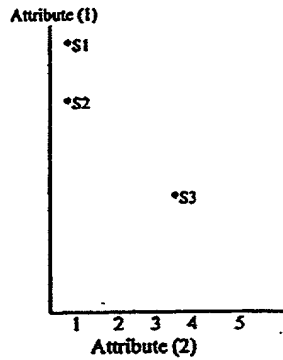
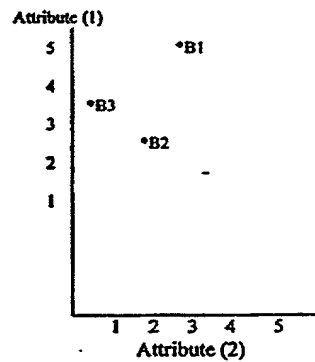


Fig. 15n

PRODUCT FEATURES ANALYSIS

Geog. Unit	Year	Consumer Segment		Scale: 1-5		
PRODUCT ATTRIBUTES/ FEATURES	Alternative Products	BRAND EVALUATION		Conclusions		
		The Brand	Brand I	Brands	Score	Y/N
1. ATTRIBUTE (1) Col1	Col2	Col3	Col4	Col5	Col6	Col7
1.1 Feature						
1.2 Feature						
2. ATTRIBUTE (2)						
2.1 Feature						
2.2 Feature						
3. ATTRIBUTE (3)						
3.1 Feature						
3.2 Feature						
Number of Products						

Scale = 5 excellent 4-3-2 = acceptable 1 = not acceptable

Y/N = yes/no marketing opportunity = there is a marketing opportunity, if no brand (or alternative product) received (5) valuation.

Fig. 15o

IMPORTANCE OF PRODUCT FEATURES

Geog. Unit	Year	Scale: 1-5			
CONSUMER BASE	RATING *	SEGMENT I	RANK	SEGMENT II	RANK
1. Col1	Col2	1. Col3	Col4	1.	
2.		2.		2.	
3.		3.		3.	
4.		4.		4.	
5.		5.		5.	
6.		6.		6.	
7.		7.		7.	

* The highest rating the feature received.

Fig. 15p
PRODUCT FEATURES ANALYSIS PER BRAND

Geog. Unit	car	Brand	Consumer Segment	Scale: 1-5	
PRODUCT FEATURES NEEDED IN ORDER TO BE					
1. Equal to: Brand			2. Superior to: Brand		
Product Features	Rating	Rating Needed	Product Features	Rating	Rating Needed
1. Col1	Col2	Col3	1. Col4	Col5	Col6
2.			2.		
3.			3.		
4.			4.		
5.			5.		
6.			6.		
Number of Products:			Number of Products:		

Fig. 15r

COMPETITIVE EVALUATION

Geog. Unit	Year	Brand	Consumer Segment	Scale: 1-5	
STRATEGY: Equal (Superior)			Target Rating	COMPETITIVE ADVANTAGE	
Product Features	Rating	Rating Needed			
1. Col1	Col2	Col3	Col4	Col5	
2.					
3.					
4.					
5.					
6.					
Number of Products:					

Fig. 15s

PRODUCT LINE DEVELOPMENT

Geog. Unit Year Scale: 1-5

TOTAL MARKET		PRODUCT I			
Product Features	Rating	Price	Consumer Segment	Final Product Specification	Rating
1. Col.1	Col.2	Col.3	Col.4	Col.5	Col.6
2.					
3.					
4.					
5.					
6.					
7.					
8.					
Target Price \$					

Fig. 15t

FINAL PRODUCT SPECIFICATIONS

Geog. Unit Year Number of Products:

— PRODUCT I —		— PRODUCT II —		— PRODUCT III —	
Product Features	Rating	Product Features	Rating	Product Features	Rating
1. Col.1	Col.2	1.		1.	
2.		2.		2.	
3.		3.		3.	
4.		4.		4.	
5.		5.		5.	
6.		6.		6.	
7.		7.		7.	
8.		8.		8.	
Segment / Price					

Fig. 15u

PRODUCT TYPE INTRODUCTIONS

Geographic Units	Year			Year		
	Product I	Product II	Product III	Product I	Product II	Product III
Col1	Col2	Col3	Col4			
TOTAL						
Target Price						
Introduction Date						

Fig. 15v

COMPETITIVE PRODUCT OVERVIEW					
GEOG. UNIT		YEAR	PRODUCT TYPE		
PRODUCT/ BRAND	TARGET SEGMENT	CONSUMER NEED / POSITIONING	PRODUCT FEATURE	REASON	ADVERTISING MESSAGE
Col1	Col2	Col3	Col4	Col5	Col6

Fig. 15w

PACKAGING/SERVICE STRATEGIES		
GEOG. UNIT	YEAR	PRODUCT I
I. PACKAGING STRATEGY: 1		
1. CONCEPT: 2		
2. SIZE: 3		
3. SHAPE: 4		
4. MATERIAL: 5		
5. COLOR: 6		
6. DESIGN/TEXT: 7		
7. BRAND MARK: 8		
8. LABELING: 9		
II. CUSTOMER SERVICE STRATEGY: 10		

Fig. 15x

SALES PER PRODUCT TYPE AND FORECAST

BRAND		YEAR					(UNITS 00)*		
GEOGRAPHIC UNITS	BRAND TOTAL			PRODUCT I			PRODUCT II		
	#	%	Share %	#	%	Share %	#	%	Share %
Col.1	Col.2	Col.3	100 Col.4	Col.5	Col.6	Col.7			
			100						
			100						
REMAINDER			100						
TOTAL		100	100		100			100	
MARKET Share									
PRICE \$									

*Also in dollars

Fig. 15y

BRAND SHARES PER PRODUCT TYPE

PRODUCT		YEAR					UNITS (00)*			
Geographic Units	Our brand		Brand I		Brand II		Remainder		Total Market	
	#	Share %	#	Share %	#	Share %	#	Share %	#	Share %
Col.1	Col.2	Col.3	Col.4	Col.5	Col.6	Col.7	Col.8	Col.9	Col.10	100 Col.11
										100
										100
										100
Remainder										100
TOTAL										100

Fig. 15z

SALES OBJECTIVE DEVELOPMENT PER PRODUCT TYPE

GEOG. UNIT	YEAR		BRAND			(UNITS 00)		
PRODUCTS	TOTAL MARKET		----- B R A N D S A L E S -----					
	#	%	PRICE I	PRICE II	PRICE III	TOTAL #	%	Share %
PRODUCT I Col1	Col2	Col3	Col4	Col5	Col6	Col7	Col 8	Col9
PRODUCT II								
PRODUCT III								
TOTAL		100					100	
BRAND SHARES PER PRICE LEVEL								

*Also in dollars

Fig. 15 aa

SALES COMPARISON PER CONSUMER SEGMENT AND PRODUCT TYPE

BRAND	YEAR		(UNITS 00)*					
GEOGRAPHIC UNITS	PRODUCT I		SEGMENT I		PRODUCT II		SEGMENT II	
	#	Share%	#	Share%	#	%	#	Share%
Col.1	Col.2	Col.3	Col.4	Col.5	Col.6	Col.7	Col.8	Col.9
REMAINDER								
TOTAL								
MARKET SHARE								
PRICE								

* Also in dollars

Fig. 16a
PRICE SEGMENTATION PER PRICE LEVEL

Geog. Unit	Year			Consumer Segment			(Units)		
PRICE LEVEL	M A R K E T			B R A N D			R E M A I N D E R		
	#	%	Share %	#	%	Share %	#	%	Share %
Price Level I Col.1	Col.2	Col.3	100 Col.4	Col.5	Col.6	Col.7	Col.8	Col.9	Col.10
Average Price \$									
Price Level I			100						
Average Price \$									
Price Level I			100						
Average Price \$									
T O T A L		100	100		100			100	
Average Price \$									

Also in dollars

Fig. 16b

RANKING OF BRANDS PER PRICE LEVEL

Geog. Unit		Year		Consumer Segment		(Units)	
MARKET		PRICE LEVEL I		PRICE LEVEL II		PRICE LEVEL III	
1. Brand	(%)	1.	(%)	1.	(%)	1.	(%)
2. Col.1	Col.2	2. Col.3	Col.4	2.		2.	
3.		3.		3.		3.	
4.		4.		4.		4.	
5.		5.		5.		5.	
6.		6.		6.		6.	

Also in dollars

Fig. 16c
SALES OBJECTIVES PER PRICE LEVEL

Brand	Brand			Year			(Units)		
GEOGRAPHIC UNITS	TOTAL MARKET			PRICE LEVEL I			PRICE LEVEL II		
	#	%	Share %	#	%	Share %	#	%	Share %
Col.1	Col.2	Col.3	Col.4	Col.5	Col.6	Col.7			
			100						
			100						
			100						
			100						
			100						
TOTAL		100	100		100			100	
Brand Share %									
Average Price									

* Also in dollars

Fig. 16d

PRICE SEGMENTATION PER PRODUCT

Geog. Unit	Year	Consumer Segment		(Units)
PRODUCT FEATURES	PRICE LEVEL II			
	MARKET	THE BRAND	BRAND 1	NEW OFFER
1. Col.1	Col.2	Col.3	Col.4	Col.5
2.				
3.				
4.				
5.				
6.				
7.				
8.				
9.				
10.				
TARGET PRICE				

Fig. 16e
PRICE ELASTICITY ANALYSIS

Geog. Unit	Year		Consumer Segment			(Unit)
	(1)	(2)	(3)	(4)	(5)	(6)
(P) Price	1					
(D) Demand	2					
ELASTICITY	3					

Fig. 16f
PRICE SEGMENTATION PER CONSUMER SEGMENT

Geog. Unit	Year		Consumer Segment			(Units)			
PRICE LEVEL	M A R K E T			SEGMENT I			SEGMENT II		
	#	%	Share %	#	%	Share %	#	%	Share %
Price Level I Col.1	Col.2	Col.3	100 col.4	Col.5	Col.6	Col.7	Col.8	Col.9	Col.10
Average Price \$									
Price Level I			100						
Average Price \$									
Price Level I			100						
Average Price \$									
T O T A L		100	100		100			100	
Average Price \$									
Segment Size (000)									
Target Price \$									

Also in dollars

Fig. 16g

PRICE SEGMENTATION PER DISTRIBUTION CHANNEL

Geog. Unit	Year			Consumer Segment			(Units)		
PRICE LEVEL	M A R K E T			CHANNEL I			CHANNEL II		
	#	%	Share %	#	%	Share %	#	%	Share %
Price Level I Col.1	Col.2	Col.3	100 Col.4	Col.5	Col.6	Col.7	Col.8	Col.9	Col.10
Average Price \$									
Price Level I			100						
Average Price \$									
Price Level I			100						
Average Price \$									
T O T A L		100	100		100			100	
Average Price \$									

Also in dollars

10070893-030602

MARKET ANALYSIS PER TYPE OF DISTRIBUTION

Fig. 17a

Geog. Unit	Distribution Channels	Year					Brand										(000)			
		Outlets (000)	ALL DISTRIBUTORS			Average Sales	THE BRANDS DISTRIBUTORS										SALES		BRAND	
			#	%			Other (Col. 1)	SOLE AGENT (Col. 2)	SOLE AGENT (Col. 3)	SOLE AGENT (Col. 4)	SOLE AGENT (Col. 5)	SOLE AGENT (Col. 6)	SOLE AGENT (Col. 7)	SOLE AGENT (Col. 8)	SOLE AGENT (Col. 9)	SOLE AGENT (Col. 10)	#	%	Share %	Distr. Share %
	TYPE I Col. 1	Col. 2	Col. 3	Col. 4	Col. 5	Col. 6	Col. 1	Col. 2	Col. 3	Col. 4	Col. 5	Col. 6	Col. 7	Col. 8	Col. 9	Col. 10	Col. 11	Col. 12	Col. 13	Col. 14
	TYPE II																			
	TYPE III																			
	TYPE IV																			
	TYPE V																			
	TYPE VI																			
	TYPE VII																			
	TYPE VIII																			
	TYPE IX																			
	REMAINDER																			
	NO DATA																			

• Also in Dollars

Fig. 17b

IMPORTANCE OF TYPES OF DISTRIBUTION

Geog. Unit	Year				(000)
TOTAL MARKET	THE BRAND'S DISTRIBUTORS	BRAND SALES	MARKET REACH	DISTRIBUTOR SHARE	
1. Type of Distribution	Type of Distribution (1)	Type of Distribution (1)	Type of Distribution (%)	Type of Distribution (%)	
2. Col.1	Col.2	Col.3	Col.4	Col.5	
3.					
4.					
5.					
6.					

Also in Dollars (1) Ranking number of the distribution channel in the total market

Fig. 17c

FIRST STRATEGY INDICATIONS

Geog. Unit	Year	
NEW DISTRIBUTION CHANNELS	CHANNELS TO IMPROVE SHARE	
	(X)	(Y)
Col.1	Col.2	Col.4

(X) = Market Reach

(Y) = Distribution share

Fig. 17d

BRAND SHARES PER TYPE OF DISTRIBUTION										(Units)
Geog Unit.	Year									
Distribution Channels	Total Market			The Brand			Brand I			
	#		Share %	#	%	Share %	#	%	Share %	
Col.1	Col.2	Col.3	Col.4	Col.5	Col.6	Col.7	Col.8	Col.9	Col.10	
TOTAL		100			100			100		

Fig. 17 e

RANKING OF TYPES OF DISTRIBUTION PER BRAND

Geog. Unit	Year				(000)
TOTAL MARKET	THE BRAND	BRAND I	BRAND II	BRAND III	
1. Type of Distribution (%)	Type of Distribution (%)	Type of Distribution (%)	Type of Distribution (%)	Type of Distribution (%)	
2. Col.1	Col.2	Col.3	Col.4	Col.5	
3.					
4.					
5.					
6.					

Also in Dollars

Fig. 17f

RANKING OF BRANDS PER TYPE OF DISTRIBUTION

Geog. Unit	Year				(000)
TOTAL MARKET	TYPE I	TYPE II	TYPE III	TYPE IV	
1. Brand (%)	Brand (%)	Brand (%)	Brand (%)	Brand (%)	
2. Col.1	Col.2	Col.3	Col.4	Col.5	
3.					
4.					
5.					
6.					

Also in Dollars

Fig. 17 g

DETERMINING FACTORS USED BY DISTRIBUTORS FOR BRAND EVALUATION

Geog. Unit	Year					Score: low-high
Distribution Channels	FACTOR I	FACTOR II	FACTOR III	FACTOR IV	FACTOR V	
TYPE I Col.1	Col.2	Col.3	Col.4	Col.5	Col.6	
TYPE II						
TYPE III						
TYPE IV						
TYPE V						
REMAINDER						

Fig. 17 h

RANKING OF DETERMINING FACTORS

Geog. Unit	Year			Score: low-high
TYPE I	TYPE II	TYPE III	TYPE IV	
1. Factor	1. Factor	1. Factor	1. Factor	
2. Col.1	2. Col.2	2. Col.3	2. Col.4	
3.	3.	3.	3.	
4.	4.	4.	4.	

Fig. 17 i

OVERVIEW OF DETERMINING FACTORS

Distr. Channel	Year					Score: low-high
Geographic Units	FACTOR I	FACTOR II	FACTOR III	FACTOR IV	FACTOR V	
Col.1	Col.2	Col.3	Col.4	Col.5	Col.6	
TOTAL						

Fig. 17j

BRAND IMAGE IN THE DISTRIBUTION CHANNELS

Geog. Unit	Year		Distr. Type		Score: low-high
FACTORS	THE BRAND	BRAND I	BRAND II	BRAND III	Strong / Weak
1. Factor Col.1	Col.2	Col.3	Col.4	Col.5	Col.6 (x)
2. Factor					
3. Factor					
4. Factor					

Fig. 17k
RANKING OF BRANDS

Geog. Unit	Year	Distribution Type			Score: low-high
FACTOR I	FACTOR II	FACTOR III	FACTOR IV	FACTOR V	FACTOR VI
1. Brand (x)	1.	1.	1.	1.	1.
2. Col.1	2. Col.2	2. Col.3	2. Col.4	2. Col.5	2. Col.6
3.	3.	3.	3.	3.	3.
4.	4.	4.	4.	4.	4.

Fig. 17l
STRENGTH AND WEAKNESS ANALYSIS

Geog. Unit	Year	Brand		Score: low-high
Distribution Channels	FACTOR I	FACTOR II	FACTOR III	FACTOR IV
TYPE I	Strong / Weak (x)			
TYPE II Col.1	Col.2	Col.3	Col.4	Col.5
TYPE III				
TYPE IV				
TYPE V				
REMAINDER				

Fig. 17m
OVERVIEW OF BRAND IMAGE IN THE DISTRIBUTION CHANNELS

Distr. Channel	Year		Factor		Score: low-high
Geographic Units	THE BRAND	BRAND I	BRAND II	BRAND III	Strong / Weak
Col.1	Col.2	Col.3	Col.4	Col.5	Col.6 (x)
TOTAL					

Fig. 17n
BRAND SHARES PER TYPE OF DISTRIBUTION

Geographic Unit		Year						(Units)		
Distribution Channels		TOTAL MARKET			Segment I			Segment II		
		#	%	Share %	#	%	Share %	#	%	Share %
TYPE I	Col.1	Col.2	Col.3	Col.4	Col.5	Col.6	Col.7	Col.8	Col.9	Col.10
TYPE II				100						
TYPE III				100						
TYPE IV				100						
TYPE V				100						
NEW TYPE A				100						
NEW TYPE B				100						
TOTAL			100	100		100			100	

Fig. 17o

RANKING OF TYPES OF DISTRIBUTION PER CONSUMER SEGMENT

Geog. Unit	Year				(000)
TOTAL MARKET	SEGMENT I	SEGMENT II	SEGMENT III	SEGMENT IV	
1. Type of Distribution (%)	Type of Distribution (%)	Type of Distribution (%)	Type of Distribution (%)	Type of Distribution (%)	
2. Col.1	Col.2	Col.3	Col.4	Col.5	
3.					
4.					
5.					
6.					

Also in Dollars

Fig. 17p

RANKING OF CONSUMER SEGMENTS PER TYPE OF DISTRIBUTION

Geog. Unit	Year				(000)
TOTAL MARKET	TYPE I	TYPE II	TYPE III	TYPE IV	
1. Segment (%)	Segment (%)	Segment (%)	Segment (%)	Segment (%)	
2. Col.1	Col.2	Col.3	Col.4	Col.5	
3.					
4.					
5.					
6.					

Also in Dollars

Fig. 17r

OVERVIEW OF DISTRIBUTION SEGMENTATION

Geog. Unit.	Year						(Units)		
Distribution Channels	TOTAL MARKET			SEGMENT I			SEGMENT II		
	#		Share %	#	%	Share %	#	%	Share %
Col.1	Col.2	Col.3	Col.4	Col.5	Col.6	Col.7	Col.8	Col.9	Col.10
			100						
			100						
TOTAL		100	100		100			100	

Fig. 17s
SALES OBJECTIVES PER CONSUMER SEGMENT AND TYPE OF DISTRIBUTION

Geog. Unit	Year		Brand		(Units)*				
DISTRIBUTION CHANNELS	— T O T A L —				— SEGMENT I —				
	TOTAL MARKET		THE BRAND		TOTAL MARKET		THE BRAND		
	#	%	#	Share %	#	%	#	Share %	
TYPE I	Col.1	Col.2	Col.3	Col.4	Col.5	Col.6	Col.7	Col.8	Col.9
TYPE II									
TYPE III									
NEW TYPE A									
NEW TYPE B									
REMAINDER									
TOTAL		100					100		

*Also in dollars

Fig. 17 t
COMPARISON OF BRAND SHARES PER CONSUMER SEGMENT

Geog. Unit	Year		Brand		(Units)*			
DISTRIBUTION CHANNELS	TOTAL MARKET		SEGMENT I		SEGMENT II		SEGMENT III	
	Share %		Share %	Difference %	Share %	Difference %	Share %	Difference %
TYPE I	Col.1	Col.2	Col.3	Col.4	Col.5	Col.6	Col.7	Col.8
TYPE II								
TYPE III								
NEW TYPE A								
NEW TYPE B								
REMAINDER								
TOTAL								

* Also in dollars

Fig. 17u.
COMPARISON OF DISTRIBUTION AND PRODUCT STRATEGIES

Geog. Unit			Year		Brand			(Units)		
Distribution Channels			Total Market		Brand Sales					
			\$	%	PRODUCT I	PRODUCT II	PRODUCT III	Total	%	Share %
TYPE I	Col.1	Col.2	Col.3	Col.4	Col.5	Col.6	Col.7	Col.8	Col.9	
TYPE II										
TYPE III										
TYPE A										
TYPE B										
REMAINDER										
TOTAL			100					100		

* Also in dollars

Fig. 17x
OVERVIEW OF PRODUCT STRATEGY PER TYPE OF DISTRIBUTION

Distribution Channel			Year		Brand			(Units)	
Geographic Units	TOTAL MARKET		BRAND SALES						
	#	%	PRODUCT I	PRODUCT II	PRODUCT III	TOTAL	%	Share %	
	Col.1	Col.2	Col.3	Col.4	Col.5	Col.6	Col.7	Col.8	Col.9
TOTAL		100						100	

* Also in dollars

Fig. 17y

DISTRIBUTION STRATEGY OVERVIEW

Geog. Unit		Brand				(Units)			
Distribution Channels		Y e a r				Y e a r			
		Market	Brand Sales			Market	Brand Sales		
		#	#	%	Share %	#	#	%	Share %
TYPE I	Col.1	Col.2	Col.3	Col.4	Col.5	Col.6	Col.7	Col.8	Col.9
TYPE II									
TYPE III									
TYPE A									
TYPE B									
REMAINDER									
TOTAL				100				100	

* Also in dollars

Fig. 17z

OVERVIEW OF SALES OBJECTIVES

Distr. Channel		Brand				(Units)			
Geographic Units		Y e a r				Y e a r			
		Market	Brand Sales			Market	Brand sales		
		#	#	%	Share %	#	#	%	Share %
Col.1	Col.2	Col.3	Col.4	Col.5	Col.6	Col.7	Col.8	Col.9	
TOTAL				100				100	

* Also in dollars

Fig. 17aa

NUMBER OF OUTLETS DEVELOPMENT FORECAST

Geog. Unit

Distribution Channels	Year		Year		Year	
	Outlet #	Growth %	Outlet #	Growth %	Outlet #	Growth %
TYPE I Col.1	Col.2	Col.3	Col.4	Col.5	Col.6	Col.7
TYPE II						
TYPE III						
NEW TYPE A						
NEW TYPE B						
REMAINDER						
TOTAL						

*Also in dollars

Fig. 17bb

OVERVIEW OF NUMBER OF OUTLETS DEVELOPMENT

Distr. Channel

Geographic Units	Year		Year		Year	
	Outlet #	Growth %	Outlet #	Growth %	Outlet #	Growth %
Col.1	Col.2	Col.3	Col.4	Col.5	Col.6	Col.7
TOTAL						

*Also in dollars

Fig. 17cc

DEVELOPMENT OF DISTRIBUTION OBJECTIVES

Geog. Unit	YEAR				BRAND		(UNITS)		
	TOTAL MARKET		MARKET REACH		DISTRIBUTION SHARE		BRAND SALES		
	#	%	Current %	YEAR %	Current %	YEAR	#	%	Share %
DISTRIBUTION CHANNELS									
TYPE I Col.1	Col.2	Col.3	Col.4	Col.5	Col.6	Col.7	Col.8	Col.9	Col.10
TYPE II									
TYPE III									
TYPE A									
TYPE B									
REMAINDER									
TOTAL		100						100	

* Also in dollars

Fig. 17dd

NUMBER OF OUTLETS OBJECTIVES

Geog. Unit	Brand				(Units00)			
	Total Market		Current Distributors		Outlets Needed		Difference	Brand
	Outlets #	Average Sales	Outlets #	Average Sales	Outlets	AVERAGE SALES	Outlets	AVERAGE SALES
DISTRIBUTION CHANNELS								
TYPE I Col.1	Col.2	Col.3	Col.4	Col.5	Col.6	Col.7	Col.8	Col.9
TYPE II								
TYPE III								
TYPE A								
TYPE B								
REMAINDER								
TOTAL								

*Also in Dollars

Fig. 18a
MEDIA EXPENDITURE ANALYSIS

Geog. Unit	Year								(\$000)
Media	Total Marketed		The Brand		Brand I		Brand II		
	\$	%	\$	%	\$	%	\$	%	
Medium I	Col.2	Col.3	Col.4	Col.5	Col.6	Col.7	Col.8	Col.9	
Medium II									
Medium III									
Medium IV									
Non-Medium I									
Total Spending		100%		100%		100%		100%	
S.O.V.	100 %								
Brand Share %									

S. O. V. = Share of voice

Fig. 18b

RANKING OF BRANDS ACCORDING TO MEDIA EXPENDITURE

Geog. Unit	Year				(000)
Brands	Media Expenditure \$	Share of Voice %	Brand Share %	Rank	
1. Col.1	Col.2	Col.3	Col.4	Col.5	
2.					
3.					
4.					
5.					

S.O.V. = Share of voice

Fig. 18c
RANKING OF BRANDS MEDIUM

Geog. Unit	Year						(000)
MEDIUM I	MEDIUM II		MEDIUM III		MEDIUM IV		
Brands	S.O.V. %	Brands	S.O.V. %	Brands	S.O.V. %	Brands	S.O.V. %
1. Col.1	Col.2	1.		1.		1.	
2.		2.		2.		2.	
3.		3.		3.		3.	
4.		4.		4.		4.	
5.		5.		5.		5.	

S.O.V. = Share of voice

10070893-030602

Fig. 18d
OVERVIEW OF MEDIA EXPENDITURE

Medium	Year		(\$000)					
	Geographic Unit		Brand		Brand II		Remainder	
	Col.1	Col.2	Col.3	Col.4	Col.5	Col.6	Col.7	Col.8
TOTAL		100		100		100		100
Share of Voice %		100 %						

Fig. 18e
PURCHASE STEP ANALYSIS
Consumer Segment

Year	Awareness		Acceptance		Preference		Purchase level	
	Brand %	Brand %	Brand %	Brand %	Brand %	Brand %	Brand %	Brand %
Col.1	Col.2	Col.3	Col.4	Col.5	Col.6	Col.7	Col.8	Col.9
TOTAL								
INDEX								

Base: Consumer Base

Index base = Awareness level

Fig. 18f
BRAND RANK ANALYSIS
Consumer Segment

Year	Brand Share		Share of Voice		Awareness		Acceptance		Preference		Purchase level	
	%	Rank	%	Rank	%	Rank	%	Rank	%	Rank	%	Rank
Col.1	Col.2	Col.3	Col.4	Col.5	Col.6	Col.7	Col.8	Col.9	Col.10	Col.11	Col.12	Col.13
TOTAL												

Fig. 18g

SETTING ADVERTISING GOALS

Geog. Unit	Consumer Segment							
	Awareness Level %	Acceptance		Preference		Purchase		Brand Share %
		Level %	Index	Level %	Index	Level %	Index	
Current Year Col.1	Col.2	Col.3	Col.4	Col.5	Col.6	Col.7	Col.8	Col.9
Year (1)								
Year (2)								
Year (3)								
End of Planning Period								

Base = Consumer Base Index Base = Awareness Level

Fig. 18h

OVERVIEW OF ADVERTISING GOALS

[illegible]

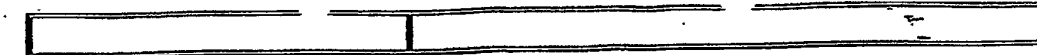
Fig. 18i

ADVERTISING SENSITIVITY ANALYSIS

Geog. Unit	Brand	(Units)						
	Year	Year	Year	Future Year	Future Year	Future Year	Future Year	Future Year
Media Budget	1							
Brand Sales	2							
Awareness %	3							
Acceptance %	4							
Preference %	5							
Purchase Level %	6							
Market Share %	7							
Total Media Spending \$	8							
Factor (x)	9							

Fig. 18j

MEDIA PLAN DEVELOPMENT		
GEOG. UNIT:	YEAR	CAMPAIGN: 1
MEDIUM: Magazine	Good Housekeeping	Consumers #:
TIMING	May. 1-June 15	
CONSUMER SEGMENT	Women 25-40	600,000
ADVERTISING GOALS:		
Media reach (GRPs)	34%	204,000
Number of contacts	16	1,122,400.00
Media index	42.4%	
Insertions needed	15	
PLACEMENT COSTS: 5	U.S. \$ 15,000	
CAMPAIGN EXPENSE: 6	U.S. \$ 225,000	
AWARENESS LEVEL: 7	40%	81,600
PURCHASE LEVEL: 8	8%	6,528
FREQUENCY OF PURCHASE: 1 9	Sales potential (in units):	6,528



* Gross rating point

209060-EE802001

Fig. 18k

GEOG. UNIT		MEDIA PLAN				YEAR	
MEDIA		CONSUMER COVERAGE		AWARENESS LEVEL		POL. SALES (\$)	ADV. BUDGET (\$)
		(000)	\$/000	%	(000)	(000)	(000)
VEHICLE I	Col.1	Col.2	Col.3	Col.4	Col.5	Col.6	Col.7
VEHICLE II							
VEHICLE III							
VEHICLE IV							
TV-OUT AD							
DUPLICATIONS %:		SALES OBJ. (#000) 9				AWARENESS: % 11	
		Difference (#000): 10				%	Difference: % 12

Fig. 18l

GEOG. UNIT		MEDIA PLAN SUMMARY				YEAR	
MEDIA		CONSUMER COVERAGE		AWARENESS LEVEL		POL. SALES (\$)	ADV. BUDGET (\$)
		(000)	\$/000	%	(000)	(000)	(000)
MEDIUM I	Col.1	Col.2	Col.3	Col.4	Col.5	Col.6	Col.7
MEDIUM II							
MEDIUM III							
MEDIUM IV							
MEDIUM V							
MEDIUM VI							
TOTAL							

Fig. 18m

ADVERTISING BUDGET

(\$000)

Geographic Unit	Sales %	Advertising Budget - current year			Advertising Budget - Year			
		MEDIA	Other	TOTAL	MEDIA	Other	TOTAL	%
(Col.1)	Col.2	Col.3	Col.4	Col.5	(Col.6)	(Col.7)	(Col.8)	(Col.9)
High Level TOTAL	100%							100%

Fig. 18n

ADVERTISING BUDGET OVERVIEW

(\$000)

Media	Year		Year		Year		Year	
	\$	Growth Rate %	\$	Growth Rate %	\$	Growth Rate %	\$	Growth Rate %
MEDIUM I Col.1	Col.2	Col.3						
MEDIUM II								
MEDIUM III								
TOTAL								

Fig. 18o

ADVERTISING STRATEGY OVERVIEW

(Units)

Geographic Unit	Sales	Brand Share %	Advertising Budget (\$000)	Sales (\$10,000)	Major Media
Col.1	Col.2	Col.3	Col.4	Col.5	Col.6

Fig. 12g

NUMBER OF UNITS OWNED

Year						(000)
Geographic Units	Products Owners (000)	Number of Owners With			Average units owned	Total units owned
		One unit	Two units	Three units		
	Col.1	Col.2	Col.3	Col.4	Col.5	Col.6
TOTAL Market						

Fig. 12h

NET SCRAPPAGE CALCULATION

Year				(000)
Geographic Units	Number of Units Scrapped (000)	Units Replaced		Net Scrappage #
	Col.1	Col.2	Col.3	Col.4
TOTAL Market				

Fig. 12i

REPLACEMENT PURCHASES

								(Units)
Geog. Units	Year	#	%	Year	#	%	Year	%
	Col.1	Col.2						
TOTAL Market								

Fig. 12j
Market Forecast III - Consumer Durables
Option:1 / 2

Year (Units)

Geog.Units	Initial Purchase		Additional Purchase		Replacement Purchase		Total Market
	#	%	#	%	#	%	
	Col.1	Col.2	Col.3	Col.4	Col.5	Col.6	Col.7
TOTAL Market							

Fig. 12k

ADDITIONAL PURCHASES DEVELOPMENT

Geographic Units	Past Year		Past Year		Future Year		Future Year	
	#	Growth Rate %	#	Growth Rate %	#	Growth Rate %	#	Growth Rate %
	Col.1	Col.2			Col.5	Col.6		
TOTAL Market								

Fig. 12l

FINAL MARKET FORECAST

(Units)

Geog. Units	Current Market		Future Year			Final Forecast
	Forecast I	Forecast II	Forecast III	Forecast IV	Forecast V	
	Col.1	Col.2	Col.3	Col.4	Col.5	
TOTAL Market						

Fig. 12m

MARKET DEVELOPMENT SUMMARY

Geographic Units	Mty	Market EOP		Growth Rate %	\$Market Rank	Current Market		Planner's Rank
		#	%			#	%	
	Col.1	Col.2	Col.3	Col.4	Col.5	Col.6	Col.7	Col.8
TOTAL Market			100				100	

Mty= Market Maturity Indication Introduction / Growth / Maturity / Decline
 EOP= End of Planning period defined by user
 \$Sales Rank= Rank of Geographic unit in the dollar sales market.

Fig. 12n

STRATEGY SUMMARY

Geographic Units	Mty	Current Brand Share		Strategy indications			
		%	Rank	Share Growth	Maintain	Harvest	Terminate
	Col.1	Col.2	Col.3	Col.4	Col.5	Col.6	Col.7
TOTAL Market							

Fig. 12o

YEAR: period		MARKET MONITOR						(Units)	
		Cons. Seg.							
Geog. Units	Month		Month		Month		Quarter-Total		
	#	%	#	%	#	%	#	%	
Geog. I Plan Actual	Col.1 A. B.	Col.2							
Difference	C								
Geog II Plan Actual									
Difference									
TOTAL Plan Actual									
Difference									

Also in Dollar

Fig. 12p

Y-T-D MONITOR

YEAR: Period		Cons. Seg.				(Units)		
Geog. Units	Year-to-Date				Period:			
	Plan	Actual	Difference		Plan	Actual	Difference	
			#	%				
	Col.1	Col.2	Col.3	Col.4				
TOTAL Market								

Also in Dollars

Fig. 12r

MARKET BREAKDOWN ACCORDING TO CONSUMER SEGMENT

Geographic Units	Past Year				Future Year			
	Segment Size		Market Size		Segment Size		Market Size	
	#	%	#	%	#	%	#	%
	Col.1	Col.2	Col.3	Col.4	Col.5	Col.6	Col.7	Col.8
TOTAL		100		100		100		100

Fig. 12s

INITIAL SELECTION OF TARGET CONSUMER SEGMENT

(Units)

Subsegments	Current Year			End of Planning Period			Primary Selection
	Sales #	Share %	\$Sales Rank	Sales #	Share %	\$Sales Rank	
1. Col.1	Col.2	Col.3	Col.4	Col.5	Col.6	Col.7	Col.8
2.							
3.							
4.							
5.							

Fig. 12t

MARKET OVERVIEW PER CONSUMER SEGMENT

Geog.Unit: (Units)

Subsegments	Past Year		Past Year		Future Year		Future Year	
	Sales #	Growth %	Sales #	Growth %	Sales #	Growth %	Sales #	Growth %
1. Col.1	Col.2	Col.3			Col.4	Col.5		
2.								
3.								
4.								
5.								

Fig. 12u

MARKET OVERVIEW PER SEGMENT AND GEOGRAPHIC UNIT

Subsegment

Geographic Units	Past Year		Past Year		Future Year		Future Year	
	Sales	Growth %	Sales	Growth %	Sales	Growth %	Sales	Growth %
	Col.1	Col.2			Col.3	Col.4		
TOTAL								

Fig. 13a

BRAND SHARE DEVELOPMENT - FORECAST I

Geographic Units	The Brand		Brand I		Brand II		Remainder		Total Market	
	#	Share %	#	Share %	#	Share %	#	Share %	#	Share %
	Col. 1	Col.2	Col. 3	Col.4	Col. 5	Col.6	Col.7	Col.8	Col.9	Col.10
										100
										100
TOTAL										100

Fig. 13b

BRAND SHARES COMPARISON

Geographic Units	Year			Year		
	Sales share %	\$Sales Share %	Difference %	Sales share %	\$Sales Share %	Difference %
	Col.1	Col. 2	Col.3			
TOTAL						

Fig. 13c

GROWTH RATES COMPARISON

Geographic Units	Brand Sales			Market	Brand	
	Growth Rate %	\$Growth Rate %	Difference %	Growth Rate %	Growth Rate %	Difference %
	Col. 1	Col. 2	Col. 3	Col. 4	Col. 5	Col. 6
TOTAL						

Fig. 13d

WINNING AND LOSING BRANDS

Geog. Unit

Brands gaining share:				Brands losing share			
Current Year		End of Planning Period		Current Year		End of Planning Period	
Brands	Gain	Brands	Gain	Brands	Loss	Brands	Loss
Col. 1	Col. 2	Col. 3	Col. 4	Col. 5	Col. 6	Col. 7	Col. 8

Fig. 13e

STRONG AND WEAK GEOGRAPHIC UNITS

Brand

Strong Geographic Units				Weak Geographic Units			
Current Year		End of Planning Period		Current Year		End of Planning Period	
Geog. Units	Share%	Geog. Units	Share%	Geog. Units	Share %	Geog. Units	Share %
Col. 1	Col. 2	Col. 3	Col. 4	Col. 5	Col. 6	Col. 7	Col. 8
Average Share			Average Share				

Fig. 13f
AVERAGE CONSUMPTION
Brand

Cons. Seg.	Year			Year			(Units)
Geographic Units	Consumers (000)	Average Consumption	Sales	Consumers (000)	Average Consumption	Sales	
	Col. 1	Col. 2	Col.3				
TOTAL							

Fig. 13g
CONSUMPTION SHARE ANALYSIS
Consumer Segment

Geog. Unit	Year					Year					(Units)
Col. 1	Consumers		Average	Sales		Consumers		Average	Sales		
	(000)	%	Consumption	#	%	(000)	%	Consumption		%	
The BRAND	Col. 2	Col. 3	Col. 4	Col. 5	Col.6						
BRAND I											
BRAND II											
TOTAL		100			100		100			100	

Fig13h
CONSUMPTION PER CONSUMER SEGMENT
Brand

GEOG. UNIT	Year					Year				
Col. 1	Consumers		Average	Sales		Consumers		Average	Sales	
	(000)	%	Consumption	(000)	%	(000)	%	Consumption	(000)	%
Segment I	Col.2	Col. 3	Col. 4	Col. 5	Col.6					
Segment II										
Segment III										
TOTAL		100			100		100			100

Fig. 13i

MARKET SHARE OBJECTIVES DEVELOPMENT									
Brand		Year							
Geog. Units	Strategy	Total Market		Current Year			Planning Year		
		Sales	Brand Sales		%	Share %	Brand Sales	%	Share %
1. Col. 1	Col. 2	Col. 3	Col. 4	Col. 5	Col. 6	Col. 7	Col. 8	Col. 9	Col. 10
2.									
3.									
TOTAL			100		100			100	

Fig. 13j

ANALYSIS OF BRAND'S POSITION									
Brand		Year							
Strong Position					Action Needed:				
Geographic Units	Rank	Share %	Competing		Geographic Units	Rank	Share %	Competing	
			Brand	Share %				Brand	Share %
Col. 1	Col. 2	Col. 3	Col. 4	Col. 5	Col. 6	Col. 7	Col. 8	Col. 9	Col. 10

Rank: according to market size

Fig. 13 k

SALES AND MARKET SHARE DEVELOPMENT								
Brand		Future Year				Future year		
Geographic Units		Sales	Change %	Share %	Change %	Sales	Change %	Share %
		Col. 1	Col. 2	Col. 3	Col. 4			
TOTAL								

Fig. 13l

MARKET AND BAND SALES FORECAST

Brand		(Units)				
Geographic Units	Future Year			Future Year		
	Market Sales	Brand Sales	Brand Share	Market Sales	Brand Sales	Brand Share
	Col.1	Col.2	Col.3			
TOTAL						

Fig. 13 m

SUMMARY OF BRAND SALES AND SHARE OBJECTIVES

Brand		Consumer Segment								(Units)
Geographic Units	Current year			End of Planning Period						
	Market Sales	Brand		Market		Brand				
		Sales	Share %	Sales	Change	Sales	Change	Share	Change	
	Col.1	Col.2	Col.3	Col.4	Col.5	Col.6	Col.7	Col.8	Col.9	
TOTAL										

Fig. 13n

RANKING OF GEOGRAPHIC UNITS ACCORDING TO SALES

Brand		Consumer Segment						(Units)
Major Sales Growth				Major Sales Loss				
Geographic Units	Current Sales	EOP Sales	Difference	Geographic Units	Current Sales	EOP Sales	Difference	
1. Col. 1	Col.2	Col.3	Col.4					
2.								
3.								
4.								

EOP = End of Planning Period

RANKING OF GEOGRAPHIC UNITS ACCORDING TO BRAND SHARE

EOP = End of Planning Period

COMPARISON OF MARKET AND BRAND SALES GROWTH

[illegible]

Fig. 13r

STRENGTH AND WEAKNESS ANALYSIS

	STRENGTH	Rank	WEAKNESS	Rank
1. Geographic Units	Col. 1	Col. 2	Col.3	Col.4
Average market share				
2. Consumer Segments				
3. Product Features				
# of Products				
4. PRICE				
Average Price \$				
5. ADVERTISING				
MEDIA				
ADV. BUDGET				
S.O.V.				
6. BRAND IMAGE				
Awareness:				
Acceptance:				
Preference:				
Market Share				
7. PROMOTION				
8. DISTRIBUTION				
Distribution Image				
9. OBSERVATIONS				

Fig. 13s

BRAND SALES MONITOR								
Year: period	Brand:				Product Type:			(Units)
Geog. Units	_____ T o t a l _____							
	Market Sales				Brand Sales			
	Plan	Actual	Difference	Dif. %	Plan	Actual	Difference	Dif. %
Col.1	Col.2	Col.3	Col.4	Col.5	Col.6	Col.7	Col.8	Col.9
TOTAL								

Also in Dollar

Also in Dollar

Fig.13t

COMPETITIVE SALES MONITOR

Geographic Unit:

Year: period

Product Type

(Units)

Brands	T o t a l							
	Brand Sales				Brand Shares			
	Plan	Actual	Difference	Dif. %	Plan	Actual	Difference	Dif. %
The Brand Col.1	Col.2	Col.3	Col.4	Col.5	Col.6	Col.7	Col.8	Col.9
Brand I								
Brand II								
TOTAL								

Also in Dollar

Also in Dollar

Fig.13u

SALES MONITOR PER CONSUMER SEGMENT								
Geographic Unit:	Brand				Year: period			(Units)
Consumer Segments	_____ T o t a l _____							
	Brand Sales				Brand Shares			
	Plan	Actual	Difference	Dif. %	Plan	Actual	Difference	Dif. %
Segment I Col.1	Col.2	Col.3	Col.4	Col.5	Col.6	Col.7	Col.8	Col.9

Segment II								
TOTAL								

Also in Dollar

10070893-010501

Fig.13v

Y-T-D MONITOR

Brand	Year: Period				Consumer Segment	Product Type		(Units)
Geog. Units	Year-to-Date				Period:			
	Plan	Actual	Difference		Plan	Actual	Difference	
			\$	%				
TOTAL								

Also in Dollars

Fig. 13w

BRAND SALES AND OBJECTIVES PER CONSUMER SEGMENT

Geog. Unit		Year								(Units)	
Consumer Segment: Age		The Brand		Brand I		Brand II		Remainder		Total Market	
		#	Share %	#	Share %	#	Share %	#	Share %	#	Share %
13 to 25	Col.1	Col.2	Col.3	Col.4	Col.5	Col.6	Col.7	Col.8	Col.9	Col.10	Col.11
26 to 50											100
50 plus											100
TOTAL											100

Also in Dollars

Fig.13x

INITIAL SELECTION OF TARGET CONSUMER SEGMENT

Geog. Unit		Brand						(Units)	
Subsegments	Current Year			End of Planning Period			Major Competitor	Selection	
	Sales #	Share %	Rank	Sales #	Share %	Rank		Pre	Tgt
1. Col.1	Col.2	Col.3	Col.4	Col.5	Col.6	Col.7	Col.8	Col.9	Col.10
2.									
10.									

Also in Dollars

Rank = ranking number according to market size

Pre= Preselection (step 66)

Tgt = target selection

Fig. 13y

Segment		Year								(Units)	
Geographic Units		The Brand		Brand I		Brand II		Remainder		Total Market	
		#	Share %	#	Share %	#	Share %	#	Share %	#	Share %
Col. 1		Col.2	Col.3	Col.4	Col.5	Col.6	Col.7	Col.8	Col.9	Col.10	Col. 11
											100
											100
TOTAL											100

Also in Dollars

Fig. 13z

Geog. Unit		Year								(Units)	
Consumer Segments		The Brand		Brand I		Brand II		Remainder		Total Market	
		#	Share %	#	Share %	#	Share %	#	Share %	#	Share %
1. Col. 1		Col.2	Col.3	Col.4	Col.5	Col.6	Col.7	Col.8	Col.9	Col.10	Col. 11
2.											100
											100
											100
10.											100

Also in Dollars

Fig. 13aa

SUMMARY OF SALES OBJECTIVES PER TARGET SEGMENT

Brand		Year			(Units)	
Geographic Units	Total Market			Segment I		
	Market Sales	Brand Sales	Brand Share %	Market Sales	Brand Sales	Brand Share %
	Col.1	Col.2	Col.3	Col.4	Col.5	Col.6
TOTAL						

Also in Dollars

Fig. 13bb

BRAND OWNERSHIP CONSUMER DURABLE GOODS

Geog. Unit		Year			(Units)	
Consumer Segment: Age		The Brand		Brand I		Total Market
		#	Share %	#	Share %	
13 to 25	Col.1	Col.2	Col.3	Col.4	Col.5	Col.6
26 to 50						100
50 plus						100
TOTAL						100

Fig.13cc

BRAND OWNERSHIP SHARE VS. MARKET SHARE ANALYSIS

Geog. Unit		Year		Consumer Segment		(Units)
Brands		Brand Sales	Brand Share %	Ownership Share %	Difference	
1.	Col.1	Col.2	Col.3	Col.4	Col.5	
2.						
3.						

Fig. 13dd

OVERVIEW OF BRAND OWNERSHIP PER GEOGRAPHIC UNIT

Brand Geographic Units	Consumer Segment				(Units)			
	Year		Year		Year		Year	
	Ownership		Difference		Ownership		Difference	
	#	Share %	Brand Share %		#	Share %	Brand Share %	
Col.1	Col.2	Col.3	Col.4	Col.5				
TOTAL								

Fig. 14a.
KEY FINANCIAL INDICATORS ANALYSIS

Geog. Unit	Year		UNIT I		UNIT II	
	PRODUCT TYPE					
	\$ (000)	% of Sales	\$ (000)	% of Sales	\$ (000)	% of Sales
SALES		100		100		100
Cost of Goods Co.1	Col.2	Col.3	Col.4	Col.5	Col.6	Col.7
REVENUE						
Revenue Adjustments						
NET REVENUE						
Marketing Expense						
Selling Expense						
Other Direct Expenses						
TOTAL DIRECT EXP.						
BRAND CONTRIBUTION						
Indirect Expenses						
TOTAL EXPENSES w/a						
BUSINESS INCOME w/a						
Allocations						
TOTAL EXPENSES						
BUSINESS INCOME						

w/a = without allocations

	YEAR			YEAR		
	PROD. TYPE	UNIT I	UNIT II	PROD. TYPE	UNIT I	UNIT II
DISCOUNT	col.1	Co.2	Col.3			

Fig. 14b
COMPARISON OF KEY FINANCIAL INDICATORS

Geog. Unit:		YEAR			(\$000)	
PRODUCT		COMPARED TO:				
	BETTER	PRODUCT	COMPARED TO:	WORSE	PRODUCT	COMPARED TO:
SALES	Col1	Col2	Col3	Col4	Col5	Col6
REVENUE INDICATORS	1.			1.		
	2.			2.		
	3.			3.		
	4.			4.		
	5.			5.		
COST INDICATORS	1.			1.		
	2.			2.		
	3.			3.		
	5.			4.		
	5.			5.		
	6.			6.		

Fig. 14c

KEY FINANCIAL INDICATORS PER BRAND

Geog. Unit		Year					
FINANCIAL INDICATORS		PRODUCT TYPE		BRAND I		BRAND II	
		\$ (000)	% of Sales	\$ (000)	% of Sales	\$ (000)	% of Sales
SALES			100 %		100 %		100 %
Cost of Goods	Col.1	Col.2	Col.3	Col.4	Col.5	Col.6	Col.7
REVENUE							
Revenue Adjustments							
NET REVENUE							
Marketing Expense							
Selling Expense							
Other Direct Expenses							
TOTAL DIRECT EXP.							
BRAND CONTRIBUTION							
Indirect Expenses							
TOTAL EXPENSES w/a							
BUSINESS INCOME w/a							
Allocations							
TOTAL EXPENSES							
BUSINESS INCOME							

w/a = without allocations

Fig. 14d

COST ITEM ANALYSIS

Geog. Unit		Year						(\$000)
		PRODUCT TYPE		UNIT I		UNIT II		
		\$ (000)	% of Sales	\$ (000)	% of Sales	\$ (000)	% of Sales	
SALES			100 %		100 %		100 %	
COST OF GOODS Col.1		Col.2	(Col.3)	Col.4	Col.5	Col.6	Col.7	
REVENUE								
ADJUSTMENTS								
Adjustment I								
Adjustment II								
NET REVENUE								
MARKETING EXP.								
Advertising								
Promotion								
Market Research								
Other								
SELLING EXPENSE								
Sales Force								
Administration								
Other								
OTHER DIRECT EXP.								
Expense I								
Expense II								
Expense III								
INDIRECT EXPENSES								
Expense I								
Expense II								
ALLOCATIONS								
Allocation I								
BUSINESS INCOME								
HURDLE RATE								

DIFFERENCE						

Fig. 14e

COST ITEM ANALYSIS PER PRODUCT TYPE

Geog. Unit		Year		(\$000)			
		PRODUCT		TYPE I		TYPE II	
		\$ (000)	% of Sales	\$ (000)	% of Sales	\$ (000)	% of Sales
SALES			100 %		100 %		100 %
COST OF GOODS	Col.1	Col.2	Col.3	Col.4	Col.5	Col.6	Col.7
REVENUE							
ADJUSTMENTS							
Adjustment I							
Adjustment II							
NET REVENUE							
MARKETING EXP.							
Advertising							
Promotion							
Market Research							
Other							
SELLING EXPENSE							
Sales Force							
Administration							
Other							
OTHER DIRECT EXP.							
Expense I							
Expense II							
Expense III							
INDIRECT EXPENSES							
Expense I							
Expense II							

ALLOCATIONS						
Allocation 1						
BUSINESS INCOME						
HURDLE RATE						
DIFFERENCE						

Fig. 14f

BREAK-EVEN ANALYSIS

Geog. Unit

Year

	The Product		Comparison
	\$ (000)		\$ (000)
RETAIL PRICE Col.1	Col.2		Col.3
MARKETING EXPENSE			
SELLING EXPENSE			
OTHER DIRECT EXPENSE			
INDIRECT EXPENSE			
ALLOCATIONS			
TOTAL FIXED COSTS			
VARIABLE COSTS (per unit)			
QUANTITY INCREMENT			
DISCOUNT RATE %			

UNITS SOLD (000)	PROFIT/LOSS %	PROFIT/LOSS %
Col.1	Col.2	Col.3

10/070893

WO 01/18730

PCT/US00/24780

These two charts are next to one another on the screen.

2090601 E6204001

Fig. 14g
P & L ANALYSIS AT DIFFERENT SALES LEVELS

Geog. Unit	Year		Product Type				UNIT	
FINANCIAL INDICATORS	ACTUAL DATA		VERSION I		VERSION II		VERSION III	
	\$ (000)	% Sales	\$ (000)	% Sales	\$ (000)	% Sales	\$ (000)	% Sales
SALES		100		100		100		100
Cost of Goods Col.1	Col.2	Col.3	Col.4	Col.5	Col.6	Col.7	Col.8	Col.8
NET BUSINESS INCOME								
Marketing expense								
Selling expense								
Other direct expenses								
DIRECT EXPENSE								
BRAND CONTRIBUTION								
Indirect expense								
INCOME w/a								
Allocations								
TOTAL EXPENSE								
BUSINESS INCOME								
DIFFERENCE in:								
SALES %								
BRAND CONTRIBUTION %								
INCOME %								
SALES INCREASE : %						DISCOUNT %:		

Fig. 14h
MARKET PROFITABILITY COMPARISON

Consumer Segment:		Year				Product type:	
FINANCIAL INDICATORS		Geog. Unit I		Geog. Unit II		Geog. Unit III	
		\$ (000)	% of Sales	\$ (000)	% of Sales	\$ (000)	% of Sales
SALES			100		100		100
Cost of Goods	Col.1	Col.2	Col.3	Col.4	Col.5	Col.6	Col.7
REVENUE							
Revenue Adjustments							
NET REVENUE							
Marketing Expense							
Selling Expense							
Other Direct Expenses							
TOTAL DIRECT EXP.							
BRAND CONTRIBUTION							
BUSINESS INCOME							

w/a = without allocations

Highest Level		100%			
TOTAL					

Fig. 18p

RANKING OF ADVERTISING EFFICIENCY

Geographic Units	Sales / \$10,000	Brand Share %	Major Media
1. Col.1	Col.2	Col.3	Col.4
2.			
3.			
4.			
5.			
6.			
7.			

Fig. 18r

ADVERTISING STRATEGY COMPARISON

Geog. Unit	Year				(Units)
Brands	Sales (000)	Brand Share %	Advertising Budget (\$000)	Sales/ \$10,000	Major Media
The Brand Col. 1	Col.2	Col.3	Col.4	Col.5	Col.6
Brand I					
Brand II					
TOTAL					

Fig. 18s

ADVERTISING SPENDING MONITOR								
Geog. Unit	Year/Period		Brand			(Units)		
	MARKET		Brand					
	Plan	Actual	Difference			Plan	Actual	Difference
		\$						
MEDIUM I Col.1	Col.2	Col.3	Col.4	Col.5	Col.6	Col.7	Col.8	Col.9
MEDIUM II								
MEDIUM III								
TOTAL								

Fig.18t
CAMPAIGN EVALUATION

Geog. Unit	Year		Consumer Segment		Brand			
	Awareness %		Acceptance %		Preference %		Purchase %	
	Plan	Actual	Plan	Actual	Plan	Actual	Plan	Actual
Vehicle I Col.1	Col.2	Col.3	Col.4	Col.5	Col.6	Col.7	Col.8	Col.9
Vehicle II								
Vehicle III								
Vehicle IV								
TOTAL								

Base: Consumer Base

Fig.18u
YEARLY OVERVIEW

Geog. Unit	Year		Consumer Segment		Brand		Medium	
	Year		Year		Year		Year	
	Plan	Actual	Plan	Actual	Plan	Actual	Plan	Actual
SALES (\$000) Col.1	Col.2	Col.3	Col.4	Col.5	Col.6	Col.7	Col.8	Col.9
Awareness %								
Acceptance %								
Preference %								

10/070893

WO 01/18730

PCT/US00/24780

Purchase Level								
----------------	--	--	--	--	--	--	--	--

Base: Consumer Base

2050E0" E680400F

Fig. 19a

PROMOTIONAL EXPENDITURE ANALYSIS

Geog. Unit	Year		(\$000)					
Types of Promotion	Total Market		Brand A		Brand B		Remainder	
	\$	%	\$	%	\$	%	\$	%
Promotion I	Col.2	Col.3	Col.4	Col.5	Col.6	Col.7	Col.8	Col.9
Promotion II								
Promotion III								
Promotion IV								
Promotion V								
Total Spending		100%		100%		100%		100%
S.O.P. %	100 %							
Spent Media Spending								
Media Spending %								

S. O. P. = Share of promotion

Fig. 19b

RANKING OF BRANDS ACCORDING TO MEDIA EXPENDITURE

Geog. Unit	Year		(000)	
Brand	Promotional Expenditure	Share of Promotion	Brand Share	Rank
	\$	%	%	
1. Col.1	Col.2	Col.3	Col.4	Col.5
2.				
3.				
4.				
5.				

S.O.V. = Share of promotion

Fig. 19c

RANKING OF BRANDS PER TYPE OF PROMOTION

Geog. Unit	Year						(000)
PROMOTION I		PROMOTION II		PROMOTION III		PROMOTION IV	
Brands	SOP %	Brands	SOP %	Brands	SOP %	Brands	SOP %
1. Col.1	Col.2	1.		1.		1.	
2.		2.		2.		2.	
3.		3.		3.		3.	
4.		4.		4.		4.	

S.		S.		S.		S.	-	
----	--	----	--	----	--	----	---	--

S.O.P. = Share of promotion

2090ED-ESB0200T

Fig. 19d

RANKING PROMOTION TYPES PER BRAND

Geog. Unit		Year				(000)	
Brand I		Brand II		Brand III		Brand IV	
Promotion type	SOP	Promotion type	SOP	Promotion type	SOP	Promotion type	SOP
1. Col1	Col2	1.		1.		1.	
2.		2.		2.		2.	
3.		3.		3.		3.	
4.		4.		4.		4.	
5.		5.		5.		5.	

S.O.P. = Share of promotion

Fig. c

OVERVIEW OF PROMOTIONAL EXPENDITURE

Type of Promotion		Year				(S000)			
Geographic Units	Total Market		Brand I		Brand II		Remainder		
	S	%	S	%	S	%	S	%	
Col1	Col2	Col3	Col4	Col5	Col6	Col7	Col8	Col9	
TOTAL		100		100		100		100	
Share of Promotion %		100%							

Fig. 19f

PROMOTION INVENTORY				
Geographic unit		Year		
Types of Promotion	Description/ Objective	Effectiveness Ratio %	Cost Efficiency	Brands Using
Col.1	Col.2	Col.3	Col.4	Col.5

Fig. 19g

PROMOTIONAL STRATEGY DEVELOPMENT			
Geographic unit		Year	
CAMPAIGNS	I	II	III
OBJECTIVE	1		
TARGET	2		
TYPE OF PROMOTION	3		
SIZE	4		
BUDGET	5		
TIMING	6		
RATIONALE	7		
SALES TARGET	8		
RESULTS	9		
COMMENTS	10		

100

Year

(Units)

SUBSTITUTE SHEET (RULE 26)

Fig. 19j

PROMOTION STRATEGY OVERVIEW								
Geog. Unit		Year			(UNITS)			
Types of Promotion	Size of Campaign	Sales Targets			Sales Actual			Budget \$ (000)
		(000)	Response Rate	Unit / \$	(000)	Response Rate	Unit / \$	
Col.1	Col.2	Col.3	Col.4	Col.5	Col.6	Col.7	Col.8	Col.9
TOTAL								

Fig. 19K

RANKING OF PROMOTIONS ACCORDING TO COST EFFICIENCY					
Geog. Unit		Year			(Units)
Types of Promotion	Size of Campaign	Sales (000)	Effectiveness Ratio	Units Sold / \$ 10,000	Budget \$ (000)
1. Col.1	Col.2	Col.3	Col.4	Col.5	Col.6
2.					
3.					
4.					
5.					
6.					

Please type a plus sign (+) inside this box → ☐

PTO/SB/01 (12-97)
Approved for use through 9/30/00 OMB 0651-0032
Patent and Trademark Office: U.S. DEPARTMENT OF COMMERCE
Under the Paperwork Reduction Act of 1995, no persons are required to respond to a collection of information unless it contains a valid OMB control number

**DECLARATION FOR UTILITY OR
DESIGN
PATENT APPLICATION
(37 CFR 1.63)**

☒ Declaration Submitted with Initial Filing **OR** ☐ Declaration Submitted after Initial Filing (surcharge (37 CFR 1.16 (e)) required)

Attorney Docket Number	23319.02
First Named Inventor	Suzanne M. Bosze
COMPLETE IF KNOWN	
Application Number	/ To be assigned
Filing Date	To be assigned
Group Art Unit	Unknown
Examiner Name	Unknown

As a below named inventor, I hereby declare that:

My residence, post office address, and citizenship are as stated below next to my name

I believe I am the original, first and sole inventor (if only one name is listed below) or an original, first and joint inventor (if plural names are listed below) of the subject matter which is claimed and for which a patent is sought on the invention entitled.

METHOD AND APPARATUS FOR INTERACTIVELY PREPARING MARKETING PLANS

the specification of which ☒ is attached hereto *(Title of the Invention)*

OR

☐ was filed on (MM/DD/YYYY) as United States Application Number or PCT International

Application Number and was amended on (MM/DD/YYYY) (if applicable)

I hereby state that I have reviewed and understand the contents of the above identified specification, including the claims, as amended by any amendment specifically referred to above

I acknowledge the duty to disclose information which is material to patentability as defined in 37 CFR 1.56

I hereby claim foreign priority benefits under 35 U.S.C. 119(a)-(d) or 365(b) of any foreign application(s) for patent or inventor's certificate, or 365(a) of any PCT international application which designated at least one country other than the United States of America, listed below and have also identified below, by checking the box, any foreign application for patent or inventor's certificate, or of any PCT international application having a filing date before that of the application on which priority is claimed

Prior Foreign Application Number(s)	Country	Foreign Filing Date (MM/DD/YYYY)	Priority Not Claimed	Certified Copy Attached?	
				YES	NO
			<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
			<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
			<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
			<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

☐ Additional foreign application numbers are listed on a supplemental priority data sheet PTO/SB/02B attached hereto

I hereby claim the benefit under 35 U.S.C. 119(e) of any United States provisional application(s) listed below

Application Number(s)	Filing Date (MM/DD/YYYY)	<input type="checkbox"/> Additional provisional application numbers are listed on a supplemental priority data sheet PTO/SB/02B attached hereto.
60/152,726	09/08/1999	

[Page 1 of 2]

Burden Hour Statement This form is estimated to take 0.4 hours to complete. Time will vary depending upon the needs of the individual case. Any comments on the amount of time you are required to complete this form should be sent to the Chief Information Officer, Patent and Trademark Office, Washington, DC 20231. DO NOT SEND FEES OR COMPLETED FORMS TO THIS ADDRESS SEND TO: Assistant Commissioner for Patents, Washington, DC 20231

Please type a plus sign (+) inside this box → ☐

PTO/SB/01 (12-87)
Approved for use through 9/30/00. OMB 0851-0032
Patent and Trademark Office: U.S. DEPARTMENT OF COMMERCE

Under the Paperwork Reduction Act of 1995, no persons are required to respond to a collection of information unless it contains a valid OMB control number.

DECLARATION — Utility or Design Patent Application

I hereby claim the benefit under 35 U.S.C. 120 of any United States application(s), or 365(c) of any PCT international application designating the United States of America, listed below and, insofar as the subject matter of each of the claims of this application is not disclosed in the prior United States or PCT international application in the manner provided by the first paragraph of 35 U.S.C. 112, I acknowledge the duty to disclose information which is material to patentability as defined in 37 CFR 1.56 which became available between the filing date of the prior application and the national or PCT international filing date of this application.

U.S. Parent Application or PCT Parent Number	Parent Filing Date (MM/DD/YYYY)	Parent Patent Number (if applicable)
PCT/US00/24780	09/08/2000	

☐ Additional U.S. or PCT international application numbers are listed on a supplemental priority data sheet PTO/SB/026 attached hereto.

As a named inventor, I hereby appoint the following registered practitioner(s) to prosecute this application and to transact all business in the Patent and Trademark Office connected therewith: ☐ Customer Number OR ☒ Registered practitioner(s) name/registration number listed below

Name	Registration Number	Name	Registration Number
Michael I. Wolfson	24,750	Mark Montague	36,612
William H. Dippert	26,723		
R. Lewis Gable	22,479		

☐ Additional registered practitioner(s) named on supplemental Registered Practitioner Information sheet PTO/SB/02C attached hereto.

Direct all correspondence to: ☐ Customer Number or Bar Code Label OR ☒ Correspondence address below

Name	R. Lewis Gable				
Address	Cowan, Liebowitz & Latman, P.C.				
Address	1133 Avenue of the Americas				
City	New York	State	NY	ZIP	10036-6799
Country	USA	Telephone	(212) 790-9200	Fax	(212) 575-0671

I hereby declare that all statements made herein of my own knowledge are true and that all statements made on information and belief are believed to be true; and further that these statements were made with the knowledge that willful false statements and the like so made are punishable by fine or imprisonment, or both, under 18 U.S.C. 1001 and that such willful false statements may jeopardize the validity of the application or any patent issued thereon.

Name of Sole or First Inventor:		<input type="checkbox"/> A petition has been filed for this unsigned inventor	
Given Name (first and middle (if any))		Family Name or Surname	
I - OO Suzanne M.		BOSZE	
Inventor's Signature	Date		3/5/02
Residence: City	Fisher Island	State	FL
		Country	US
Post Office Address	19134 Fisher Island Drive		
Post Office Address			
City	Fisher Island	State	FL
		ZIP	33109
		Country	US

☐ Additional inventors are being named on the supplemental Additional Inventor(s) sheet(s) PTO/SB/02A attached hereto